Instructional Systems Design Project

Implementing Salesforce.com
In a Non-Profit Educational Setting

Menko Johnson

Executive Summary

The admissions department of a prestigious West Coast University business school has been experiencing difficulty organizing and tracking contact information that pertains to current students, alumni and possible recruits. The 12 members of the office had no centralized means or system for organizing and making this information available to the office, and as a result, different members of the office were not aware of contacts made with students and alumni. It is critical that this information is effectively organized since the department relies on students and alumni for recruiting efforts, admissions programs, and donations to the school. The department decided they wanted to use Salesforce.com as a centralized, internet-based contact management and tracking software.

My responsibilities on the project were multifaceted. I was asked to identify the main issues preventing employees from using Salesforce.com, what tasks they would like to perform, and design training that would teach them how to use the program effectively. I conducted a needs analysis that included a staff survey and individual interviews to identify issues staff members had with the program and its function. I used this information to design a 2-day training session that was a combination of information and guided practice. I also created documentation and tutorials to serve as reference and brush up materials to help support the initial training and provide online support for when I was not in the office. Finally, I customized and modified the Salesforce.com interface to better accommodate the needs of the office since the program is not designed for a non-profit business and has many ancillary functions that confuse and befuddle the users. This report summarizes my efforts to introduce and train the staff in the use of Salesforce.com.

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Statement of the Problem

Introduction:

I was hired to design an instructional strategy that will instruct staff members on how to effectively use Salesforce.com to manage several office tasks. I was hired to train the office staff and develop the program for use in an environment Salesforce.com was not initially intended for. The office staff should be able to effectively open and navigate through the different sections of the program, find the proper function their task requires, and enter and/or update the data in Salesforce.com. Thus, they will need to have the technical skills necessary to use the program, as well as the contextual knowledge to enter and manage office-relevant data. Specific task include tracking contact with potential recruits, managing alumni relations with recruits, and recruiting potential alumni as representatives of the admissions office. In summary, users must learn to navigate and utilize Salesforce.com to more effectively manage inter-office tasks and procedures. Users currently are not using Salesforce.com to track contact information or as a centralized information tool. The office is still relying on several different non-interconnected methods of managing and communicating important admissions data that could be handled all by Salesforce.com. By the end of the training sessions, staff should be able to add/edit contact data, search for specific records, create reports based on specific criteria, and use the email and contact tools to keep track of communication between the office and the students/alumni.

Condition:

Users do not know how to effectively use the new software, Salesforce.com. Users currently are unfamiliar with the interface of Salesforce.com, and are thus unable to complete several critical tasks.

Criteria:

Users will effectively use Salesforce.com to complete several critical tasks essential to their job requirements.

Cause:

The program has not been properly adapted to the office needs and thus no clear incentive to use the program has been established. In addition, the users have not been properly trained on how to use the program, successfully navigate the interface, or use the tools it provides.

Symptoms:

Several problems stem from the lack of use of Salesforce.com. The first is financial—the money has already been invested and it is not inexpensive. Second, staff members are not effectively utilizing the alumni resources to recruit new students, manage information seminars, and other key jobs the office uses alumina for. One part of the office doesn't know if another has already contacted the alum which causes headaches for the office and can alienate alum who are being contacted multiple times without the knowledge of the staff. Third, information is not stored or analyzed effectively to help assess which recruiting methods are effective and which are not. The potential to track and analyze this information is there, but without housing it in a database system like Salesforce.com, its potential is unrealized. Finally, information is not accessible to users who are traveling to different locations to recruit students. Moving to a web-based storehouse will help make this information accessible from virtually any location for the office staff.

Needs Assessment

Phase 1: Planning

Target population:

A group of approximately 12 people working for a graduate school admissions office. Their business is managing contact information for recruiting potential admits, current students, and alumni relations. The users differ in the level of sophistication and need for the program, but all will need to have a basic understanding of the framework and how to access the data contained on it. One or two will become administrators for the program.

Strategy:

I plan to use a triangulation method of data collection that includes interviews, surveys, and observation via group meetings and a "what do you want to know" box to get my initial reading on where people are in terms of understanding the project, and use of the program. Most have only attended one or two brief trainings that introduced a rather complicated interface that had little relevance to their current responsibilities. First I will conduct informal interviews with several staff members to get a general sense of the environment before the training (see Appendix C). These strategies will be designed to answer: 1) what do you know about the program (what's it for, how to use it, etc) 2) what would you like to know about the program 3) what are your major reservations about the program? These three questions will help me shape the nature and course of the user training program. In addition, it will allow me to more effectively design the interface and backend of the database to meet the needs of the users.

I plan to collect this data over a 2 week period and conduct all of the interviews in that time. I plan to first check with two people who have partially adopted the program to get their feedback and input on what they have liked/not liked about it thus far. This will give me a gauge of what issues to expect others to have, and how I might use it to market the program and learning sessions to the rest of the staff. The drop box will give people a chance to air their views in an anonymous way so I can identify more feelings and technical issues. It will also let me address questions that might be good topics for ongoing informational training sessions

Analysis:

The analysis will be multi-faceted. The survey components will have Likert-scale 4 point questions designed to address technical issues around current knowledge of the program and its goals. Those sections can be tallied to calculate average scores on where people lie in terms of their preparedness before we start. The second component of the surveys will have open-ended written responses requiring a qualitative analysis. The survey questions will help identify issues and figure out what people would like to see the program do for them. Interviews will be based on the written responses and explore them in further detail. A qualitative analysis will be used to help frame the group meeting agenda that will be held before the official launch of training and program interface customization based on user needs.

Participants:

The subjects are 12 users of an online CRM software program, Salesforce.com that will be managing large numbers of people and their inter-related interactions over time. The users are part of a university admissions department seeking to consolidate and streamline information access to student and alumni data and information. Their jobs range from support staff to admissions officers, to department director. All have familiarity with computers and technology, but range in their individual skill levels and sophistication.

Phase 2: Collecting Data

Sample Size

The data was collected from a combination of employees at the admissions office that will be using Salesforce.com with jobs ranging from admissions officers, directors to support staff. The total number of people participating in the study is 12 (*n*=12).

Scheduling

The surveys were distributed on October 31st, and participants were given 3 days to complete the survey. Follow up interviews were conducted on November 7th and 8th, based on information gathered from the surveys and informal concerns drop box that allowed people to anonymously bring up issues of concern to them. The group sessions will begin November 22nd and run until December 1st.

Phase 3: Data Analysis

Analysis

The survey was organized to gather information about user's experience, knowledge and comfort level with Salesforce.com. Questions were grouped into three categories: (1) Current usage level of Salesforce.com, (2) Current knowledge of Salesforce.com, and (3) Concerns about using Salesforce.com. Averages were computed for yes/no and Likert-scale items, and content analysis and clustering were performed on the opened end questions Analysis of these items revealed several important facts about the participants.

Current Knowledge, Usage, Comfort Level

The results revealed that although 91.7% of users (11 of 12) participated in the Salesforce.com introductory training in July, very few of them have touched it since that time. Only 33.3% (4 of 12) of users have even logged on since July, and only 16.7% (2 of 12) have actually used it for a task. Clearly users are not currently utilizing the tool, but the question is "why not?"

On a scale of 1 to 4, with 1 being "not comfortable" and 4 "very comfortable", users report a low level of comfort with both the interface (2.3) and a high level of concern about using Salesforce.com to solve their problems. 91.7% (11 of 12) of respondents said they were "concerned about the use of Salesforce.com" to accomplish their jobs. Yet, 75.0% (9 of 12) were interested in learning more about Salesforce.com and how to use it. Table 1 summarizes these findings.

Table 1: Pre-Training Summary of Knowledge, Usage, and Comfort (*n*=12).

Dimension	# of Yes	Percentage	*n*
Participated in previous training	11	91.7%	12
Logged onto system since training	4	33.3%	12
Used system to accomplish a task	2	16.7%	12
Interested in learning more	9	75.0%	12
Have concerns regarding use of system	11	91.7%	12

Concerns about Salesforce.com

The open-ended responses and individual surveys revealed why most users were not implementing Salesforce.com into their work routines. When responding to "why are you not currently using Salesforce.com", 33.3% (4 of 12) stated they did not have enough time to learn the program thoroughly enough to use it. Additionally 25% (3 of 12) of respondents said they were not comfortable with the interface and layout, and 25% (3 of 12) did not feel they had adequate support when they ran into problems. Interviews supported these results, as most people indicated that they were continuing to use their existing means of gathering information instead of Salesforce.com, because they didn't feel adequately prepared or supported to rely upon a new means of data access. Table 2 summarizes these results.

Table 2: Pre-Training Impediments to using Salesforce.com (*n*=12).

Dimension	# Resp.	Percentage	*n*
No time to learn program	4	33.3%	12
Not comfortable with interface/layout	3	25.0%	12
Not enough support to use	3	25.0%	12
Program not necessary for job tasks	2	17.7%	12

Prioritization

Several trends emerged and are discussed below in Phase 4. Based on the analysis, it's clear that instruction will need to focus on increasing competence, confidence and foster a positive attitude towards transitioning to a new system of data management.

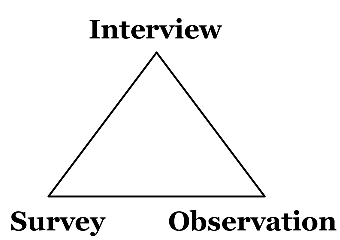
Phase 4: Final Report

Purpose

The assessment was designed to identify the current atmosphere surrounding the use of the Salesforce.com software. Despite earlier training, adoption and implementation among users was low, and management wanted a new training program designed and implemented. The assessment was aimed at discovering the current knowledge level of users, their comfort level and attitudes towards using the program, and identification of any impediments that might prevent users from successfully completing their jobs with Salesforce.com.

Before conducting the analysis, I had informally spoken with several people in the office and had a hunch that several issues were intertwined. The survey and interviews were designed to identify how much users already knew about Salesforce.com and the tools it provides, and how those tools can be applied in their job. My guess was that people were unwilling to convert to a new system because of time constraints and a lack of support for the system in the office. In addition, no leadership over implementation or support had been established in the office, leaving it up to the individual to forge their own path whenever they found time to do so. Thus the assessment sought to identify problems preventing use, and make sure they are addressed in the instructional solution.

Process



A combination of survey, interview and informal observational analyses through group meetings and solicitations were used to gather the data. This triangulation of data utilized both quantitative and qualitative data sources to assess the situation and needs of the office staff. All information was gathered from the 12 members of the office for which the instructional program is being designed for. Of those 12 members, half are support staff, and half are admissions office, each with different needs from the same data set.

Simple means were calculated on all continuous variables and percentages were calculated for the discrete "yes/no" variables. With an *n*=12, more advanced analyses to compare sub-groups were not practical due to issues of power. In reality, the small sample size allowed me to informally get to know each participant and get a feel for their comfort level with the program and their major objections to its use. A larger environment would not have allowed me this personal contact, and thus I feel very confident that I accurately understand the needs of the office.

Results

The results of the data analysis showed that participants were not lacking in motivation to learn to use Salesforce.com, but were lacking in confidence in their current knowledge and the support that they would receive in trying to implement it in their daily activities if they attempted to use it. Most had not utilized the knowledge they had gained in a previous training session, as was evidenced by the low-level of log ins and use for daily activities. Many users confided to me that the training they received was not suited to their particular situation, and the examples were not relevant to the tasks they wished to perform in Salesforce.com. This indicated that whatever training I designed for them needed to utilize real-world examples with content specific to their job activities.

In addition, the assessment also revealed a high level of concern about time management and how much time they would have to devote to learning a new system. In principle, most users expressed very positive attitudes towards the new system, but were unwilling to risk using their limited time to learn it on their own. Many users were also not aware of many of the advantages Salesforce.com could provide them, indicating a clear avenue to explore to enhance user investment in learning the program.

Action

All of this information indicates to me that the learners would most appreciate a focused, contextually-relevant group training session to explore and practice the common uses for Salesforce.com in the office. Not only would it introduce them to key concepts and an overview of the layout of the program, it would provide them ample opportunity to experiment with the program itself. Their lack of confidence in using the program indicates that the previous training exposed them to concepts, but did not allow time for hands on application of that knowledge.

Additionally, the training must focus on the streamlining and advantages it presents the user compared to the multiplicity of programs that are currently used. In addition, supporting documentation and individualized attention must be provided to ensure that the training concepts take root and users begin to practice using the program. The assessment has provided a clear picture of the needs of the learners and their concerns about the program, which will help inform the training and its design structure.

Learner Analysis

General Characteristics

The target audience of the instructional intervention are employees of a graduate school admissions office. There are 3 different pools of learners within the department, and each has a differing need for instruction. The first set of learners are all support staff that are mainly responsible for coordinating events and gathering information that admissions officers need to complete their jobs. There are 5 support staff personnel participating in the intervention.

The second set of participants is the 5 admissions officers in the department. Their needs for the intervention are different because they often travel away from the office doing recruitment and information sessions, so they will rely on Salesforce.com to provide them with information currently they are unable to access while traveling. Currently, they either cannot access this information, or must call a member of the support staff to find the information for them.

The last group of learners is the 2 directors and the technology support person in the office. While they may access the program on occasion, their interest is in using it to track information and monitor that jobs and tasks are being assigned and followed through with by officers.

While all three groups have differing needs, the introductory instructional intervention will focus on core aspects of the application and helping them become familiar with its structure. Supplemental sessions and embedded tutorials will be designed to address specific needs or tasks that any of the groups may have to perform. These will be designed based upon some of the survey feedback gathered from each group.

Specific Entry Competencies

All users will need to be able to log on to their computers, have basic understanding of how to open an internet browser and follow hyperlinks. Salesforce.com is a multi-level, tab-structured program that is relatively straight forward for a competent computer user. Since all the staff members use computers as a regular part of their job, the basic skills of computer use should be satisfied. Other competencies necessary for use of Salesforce.com is a working knowledge of the data structure and information that is stored in the database. All staff members currently use several other applications that store this same data, so they should be able to apply those skills to the new situation.

Contextual Analysis

Orienting Context

All of the learners are being required to participate in this training, and there is some passive resistance to the training. Each user had a general introduction to Salesforce.com by a consultant in May, 2005, but most have not used it since that time. The participants will be migrating to the new software system, so they will need to learn to get information from it they have traditionally pulled from other sources. The instruction program will seek to quickly establish the utility and advantage to the new program, to promote learner "buy-in." Currently, the learners do not possess the information needed to be successful, but also may not understand the value of learning how to use the program. All participants will be held accountable to be proficient in the use of Salesforce.com because its successful utilization will be necessary for each of their various jobs.

Instructional Context

The main training sessions will take place in the admission office's computer lab. There are 15 computers in 3 rows facing a 96-inch screen. All the computers are hooked up to the internet and have access to the Salesforce.com website. Included in the room are an instructional computer, an LCD projector, laser pointer, and infrared wireless mouse and keyboard to allow me to move around. The computers are close enough that they can work together and get help from each other while I walk around.

Other factors such as lighting are controllable by the computers, so I can dim the lights to show the presentations. The lab is in the basement, so there aren't any windows to contend with. The room is well insulated and once the door is closed, it's virtually soundproof and quite comfortable. Temperature can be easily moderated and controlled so that everyone is comfortable.

Transfer Context

All the trainees will be able to maximize transfer since the only hardware needs are access to a computer with internet access to use Salesforce.com and each person has that on their desktop. In addition, I will be available for individual training and support, and be developing documentation to address common tasks and problems they might incur. The greatest impediment to transfer might be the frequency of use of the some of the officers. Because they often travel, they may not get the practice they need on a regular basis. My goal is to provide them with plenty of opportunities to work on the program before they travel, and look into setting up remote access for them via their PDAs and other communication devices that they take on the road.

Task Analysis

Instructional Goal

Users will effectively use Salesforce.com to complete several critical tasks essential to their job requirements. By the end of the training (multiple sessions of 30 minutes each) users should be able to do the following:

Tasks/Topics & Learning Content:

1. **Open and Navigate through Salesforce.com (*concept*)**
    a) Gain comfort with locating and signing in to Salesforce.com **(*procedural, attitude*)**
    b) Understand navigation of the tabs at the top of the screen and differentiate the different sections of the program (contacts, accounts, leads, etc). **(*principles and rules*)**
    c) Comprehend the difference between Ambassadors (Leads) and Alumni/Students (Contacts) sections on Salesforce.com **(*principles and rules*)**
    d) Grasp elements of adaptation to admissions department's situation. e.g.: "Accounts" for our purposes are going to be the same as the "Contact" since we aren't interested in the companies, but the actual people **(*concepts)***

2. **Add/Edit Alumni and Student Information**
    a) Add/Update contact information for either Alumni, Students, or Ambassadors **(*procedure*)**
    b) Log contact information for all interactions/touchpoints, including adding email contact by using the Outlook Salesforce.com tool **(*procedure*)**
    c) Actively track when calls, emails or face-to-face contact has been made to allow for coordinated contacting of alumni and students. **(*procedure*)**

3. **Search for Alumni and Students in the database** 3 different levels of sophistication:
    a) Able to search for information based on the contacts name (*Simple searching by name*) **(*procedure*)**
    b) Create a "View" that allows you to filter information based on more than 1 variable, such as location, class year, activities, or comments. (*Advanced searching using a View*) **(*procedures*)**
    c) Generating a report that captures advanced information on contacts and is downloadable and exportable as working document (Most likely introduced as an advanced topic session separate from #1 and #2) **(*procedures*)**

4. **Create Reports Based on Specific Needs**

a) Navigate to the Reports section and pull up pre-made Custom Reports (***procedures***)
b) Customize and adapt a Custom Report to zero in on specific information (***procedures***)
c) Understand and utilize Filters to comb the data for specific information (***procedures***)

5. **Find, Utilize and Create Warehouse Documents**
    a) Locate, use and store important documents that are of use to office staff, all in one place (***procedures***)
    b) Find the "Tips and Tricks" section and use it to help with learning (***procedures***)
    c) Possibly add own documentation and/or message board for helping each other (***procedures***)

Instructional Objectives and Strategies

ISD Planning Grid

Task 1: Successfully Open and Navigate through Salesforce.com

			INSTRUCTIONAL STRATEGY		
Tasks	**Instructional Objectives**	**Performance-Content Matrix**	**Initial Presentation Strategy**	**Generative Learning Strategy**	**Assessment Item(s)**
1 Gain comfort with locating and signing in to Salesforce.com	Learners will open a web browser, find www.salesforce.com and log in with their username and password.	Procedural, Attitude	Instructor demonstrates the proper steps and then gives them a chance to do it.	Learners log in to Salesforce.com	All of the learners will successfully access Salesforce.com
2 Understand navigation of the tabs at the top of the screen and differentiate the different sections of the program.	Identify each section of the database and understand what it represents	Principles and Rules	Instructor walks the learners through each section and introduces the information contained in each.	Learners will find different types of information in each section to help them understand each section.	Learners will demonstrate they can locate several pieces of information from each section by completing an activity.
3 Comprehend the difference between Ambassadors (Leads) and Alumni/Students (Contacts) sections on Salesforce.com	Understand the data each section stores, and when to access it..	Concepts, Principles and Rules	Instructor will use mock scenarios and create a quick rubric/flowchart to help learners decide which section to use to find the information.	Learners will experiment with finding different contacts in the database to help them become familiar with the key sections.	Learners will be asked to find several people in the database and will have to figure out which section they would be in.
4 Grasp elements of adaptation to GSB's situation. eg: "Accounts" for our purposes are going to be the same as the "Contact" since we aren't interested in the companies, but the actual people	Comprehend the changes that have been applied to convert a for-profit program to the admissions office requirements.	Concepts	Instructor will explain some of the program difficulties such as a lead vs. a company, since we won't be using companies in this context.	Learners will ask questions and be asked to generate fake data that ensures they understand how these issues effect the use of Salesforce.com	Learners will submit their "fake" data to the instructor for review on the screen and allow for assistance if need be.

Task 2: Add/Edit Alumni and Student Information

			INSTRUCTIONAL STRATEGY		
Tasks	**Instructional Objectives**	**Performance-Content Matrix**	**Initial Presentation Strategy**	**Generative Learning Strategy**	**Assessment Item(s)**
1 Add/Update contact information for either Alumni, Students, or Ambassadors	Learners will search for a specific record in the correct part of Salesfore.com and add or edit part of the record	Procedural	Instructor demonstrates the proper steps and then gives them a chance to do it.	Learners will search and edit information through practice	All of the learners will successfully find and edit existing records.
2 Log contact information for all interactions/touchpoints, including adding email contact by using the Outlook Salesforce.com tool	Find and enter information in to the contacts section of a record, and integrate email conversation into the contacts section	Procedural	Instructor demonstrates the proper steps and then gives them a chance to do it..	Learners will find different records and add several types of communication to each contact record.	Learners will demonstrate they can enter information and integrate email by using several practice cases.
3 Actively track when calls, emails or face-to-face contact has been made to allow for coordinated contacting of alumni and students	Understand how to store each type of interaction (phone call, email, other), and log it in the right section. See which user has logged what information	Concepts, Procedural	Instructor will use mock scenarios which allows for guided practice entering fake contact information and how to coordinate that information with other staff members working on the project.	Learners will experiment with entering different contact information and coordinating with other members of the project team.	Learners will be asked to find several people in the database and add mock information that simulates their normal contact maintenance tasks.

Task 3: Search for Alumni and Students in the database			INSTRUCTIONAL STRATEGY		
Tasks	**Instructional Objectives**	**Performance-Content Matrix**	**Initial Presentation Strategy**	**Generative Learning Strategy**	**Assessment Item(s)**
1 Able to search for information based on the contacts name (*Simple searching by name*)	Learners will search for a specific record in the correct part of Salesfore.com and add or edit part of the record	Procedural	Instructor demonstrates the proper steps and then gives them a chance to do it.	Learners will search and edit information through practice	All of the learners will successfully find and edit existing records.
2 Create a "View" that allows you to filter information based on more than 1 variable, such as location, class year, activities, or comments. (*Advanced searching using a View*)	Filter information in the database based upon a specific criteria using Salesforce.com's View tool.	Procedural	Instructor demonstrates the proper steps and then gives them a chance to do it..	Learners will find different records based on several criteria, such as city, gender, or activity participation.	Learners will demonstrate they can filter information using the View tool by solving several mock problems.

Task 4: Create Reports Based on Specific Needs

			INSTRUCTIONAL STRATEGY		
Tasks	**Instructional Objectives**	**Performance-Content Matrix**	**Initial Presentation Strategy**	**Generative Learning Strategy**	**Assessment Item(s)**
1 Navigate to the Reports section and pull up pre-made Custom Reports	Learners will find the Reports section of Salesforce.com and view a pre-made report	Procedural	Instructor demonstrates the proper steps and then gives them a chance to do it.	Learners will locate Reports and learn how to open and view them.	All of the learners will successfully find and view existing reports.
2 Customize and adapt a Custom Report to zero in on specific information	Find and edit a Custom report to locate records based on a single criteria	Procedural	Instructor demonstrates the proper steps and then gives them a chance to do it..	Learners will modify a custom report's search criteria to find different types of information. This will introduce the structure and function of the reports through experimentation.	Learners will demonstrate they can use a Custom Report to locate information based upon mock situations the instructor presents.
3 Understand and utilize Filters to comb the data for specific information	Understand how to apply a filter to report results to quickly sort through records.	Concepts, Procedural	Instructor will use mock scenarios which allows for guided practice applying different filters to a report to let the participants experiment with the process.	Learners will experiment with entering different filter criteria to quickly drill down to the information they want from the records.	Learners will be asked to filter several reports and then create their own filter to find information they would find relevant to their own work..

Task 5: Find, Utilize and Create Warehouse Documents

			INSTRUCTIONAL STRATEGY		
Tasks	**Instructional Objectives**	**Performance-Content Matrix**	**Initial Presentation Strategy**	**Generative Learning Strategy**	**Assessment Item(s)**
1 Locate, use and store important documents that are of use to office staff, all in one place	Learners will find the Documents section Salesforce.com and learn how to view, upload and download documents.	Procedural	Instructor demonstrates the proper steps and then gives them a chance to do it.	Learners will locate Documents, and learn how to open, view, save and upload their own.	All of the learners will successfully find and view existing Documents and understand how to add to them..
2 Find the "Tips and Tricks" section and use it to help with learning	Learners will find the Tips and Tricks section Salesforce.com and learn how to view, upload and download documents.	Procedural	Instructor demonstrates the proper steps and then gives them a chance to do it.	Learners will locate Tips and Tricks, and learn how to open, view, save and upload their own.	All of the learners will successfully find and view existing Tips and Tricks and understand how to add to them.
3 Understand how to access the group message board and add own tips and tricks	Learners will find the Message Board and post a message.	Concepts, Procedural	Instructor will show how to open the Message Board and post messages and ask everyone to post a short introduction about themselves	Learners will experiment with adding messages and using the collaborative aspects of the message board	Learners will be asked to post a quick bio and what they hope to learn from the sessions about Salesforce.com.

Design and Development

Instructor Guide

Presentation Outline

Materials

Teacher Materials:

1. Presentation Overview(teacher's guide)
2. Powerpoint slideshow
3. Laptop attached to Projector in front of the room with internet access
4. Salesforce.com Microsoft Office addins installed on instructor machine and student machines
5. Username/Password List ***(not included in the ISD Project)***

Student Materials:

1. "***How to Search in Salesforce.com":*** Distribute to participants after Introduction.
2. **Final Evaluation:** Distribute at the end of the session and do not let them leave without filling it out.

Instruction

The training will rely on a combination of Powerpoint presentation and guided practice on the projector. Ensure that yours and the participants' computers can access the internet and www.salesforce.com. Introduce Salesforce.com with the Powerpoint presentation and then lead them through the guided practice "*Searching in Salesforce.com"*

Directions:

Session 1: Salesforce.com navigation and searching (90 minutes)

Use Powerpoint Presentation

1. **Introduce Salesforce.com training session purpose and goals (*5 minutes*)**
   a. **Purpose**: Introduce the program to participants and give guided practice for most common tasks
   b. **Goal:** Prepare them to use Salesforce.com in their jobs, make them comfortable with the interface, teach them how to find out more information.

2. **Demonstrate opening Internet Explorer browser and navigating to Salesforce.com (*5 minutes*)**
   a. Ensure that everyone has their username and password handy. Otherwise they can use **salesforceuser & password** to use the teaching account.

Using Salesforce.com website

3. **Open and Navigate through Salesforce.com (*10 minutes*)**

a. Open the sign in page on Salesforce.com
b. Enter the username and password (case sensitive). Use your list if someone does not know username and password. Or use the teaching account
c. Explain each of the main tabs at the top and what information they contain:
    1. Prospective Ambassadors, Students/Alumni, Reports, and Tips and Tricks
    2. Pros. Amb.-Information on students currently enrolled
    3. Students/Alumni-Information on graduates
    4. Reports-Data packaging
    5. Tips and Tricks-Documentation and help for problems.

d. Differentiate between Prospective Ambassadors (new recruits, not yet working for admissions) and Alumni (Students and Alumni that are working for admissions in some capacity.
e. Explain how Salesforce.com is being adapted, so "Accounts" will not be used. Each person's Account or Company will be simply their name, since we're not interested in their company affiliation but their services at admissions

4. **Add/Edit Alumni and Student Information (*15 minutes*)**
    a. Find a person in the Prospective Ambassadors.
        1. Click in the "Search window" and type in "Johnson"
        2. Find "Menko Johnson" and view the record
        3. Explain the screens and sections you see
        4. Show were comments and information can be added
    b. Have each participant add/edit the address information for "Menko Johnson" ONLY! Extra phone number, address or any other field. No other records (this is a **live** dataset!!!!!)
    c. Have each participant add comment/touchpoint information. Show them how it updates real-time with each change.
    d. Find "Menko Johnson" with Search in the Students/Alumni database
        1. Practice adding tracking information: calls, emails or face-to-face contact has been made
        2. Demonstrate Outlook tool for adding email communication to Salesforce.com directly from Outlook.

5. **Search for Alumni and Students in the database (*60 minutes*)**
    3 different levels of sophistication:
    a. Able to search for information based on the contacts name (*Simple searching by name*) → just covered this in Part 2.
    b. Introduce Advanced Search and View
        1. Click on "Advanced Search using Views" and make a custom view that will pull information with 1 variable.
        2. **GUIDED PRACTICE**: Have participants create views of people based on the following variables: location, class year, activities, or comments
            i. **Location:** Los Angeles
            ii. **Class Year**: 1988
            iii. **Activities**: Fall 04 Recruiting
            iv. **Comments**: Panelist

Session 2: Guided practice using "*Searching in Salesforce.com*" Handout (90 minutes)

Directions: Follow the steps in the Handout to introduce Searching and Reports.

6. **Create Reports Based on Specific Needs (35 minutes)**

a) Navigate to the Reports section and pull up pre-made Custom Reports
    1. Explain the report layout and the variables Salesforce.com searches on.
    2. Show the Custom Reports already created for their use
    3. Demonstrate and explain how to export a pre-made custom report
    4. **GUIDED PRACTICE:** Have participants export a pre-made report of their choice to Excel and open it. Have them export 3 reports total to practice on, each using a different criteria for sorting
b) Customize and adapt a Custom Report to zero in on specific information
    1. Modify the filter to search based on city
    2. Modify to find people from a specific class year and city
    3. Export the report to Excel and practice using the sort filters (see handout)
c) **GUIDED PRACTICE**: Understand and utilize Filters to comb the data for specific information. **<u>Have them find the following and export each report to Excel</u>**:
    1. Find all new Ambassadors for 2005
    2. Find all people who have participated in a Panel
    3. Find Prospective Ambassadors who live in Boston
    4. Find people that have volunteered for "Dinner on Break Host" that live in Seattle.

7. **Find, Utilize and Create Warehouse Documents (20 minutes)**
    a) Navigate to the Documents tab, and show them where documents are stored
    b) Emphasize that warehousing makes the information available to all
    c) **GUIDED PRACTICE**: Have each person upload one of their custom excel reports
        1. Demonstrate how to download documents in PDF or .doc format
        2. Demonstrate how to upload documents
        3. Discuss naming protocols and folder organization
        4. Admins are the only ones who can create new folders
    d) Find the "Tips and Tricks" section and use it to help with learning
        1. Demonstrate how to download documents
        2. Show how to add tips
        3. Point out "email administrator" feature
        4. Demonstrate use of Message board forums for help.

8. **Wrap up (30 minutes)**
    a) Review main topics for the day
    b) Ask if there are questions about the reports
    c) Hand out the Evaluation and collect it before they can leave
        1. Emphasize that its important for them to be honest about the good and bad parts of the training
        2. Ask for suggestions for improvement
    d) Thank everyone for participating
    e) Give out contact information and hours for extra help and support

Student Guide

Welcome to the Salesforce.com Training Session! These two 1-hour sessions are designed to get your up and running with Salesforce.com in managing contact information for people that help our office. During the training sessions you will learn how to:

1. Log in to Salesforce.com (do not forget to bring username and password with you)
2. Navigate through each section of the program (tabs at the top of the page) and where to find the information you need
3. Add/edit entries in the database, including touchpoints and activity information.
4. Search quickly and easily for information
5. View and Create reports to quickly summarize and export information for your projects
6. How to get help with common problems you may encounter

The sessions were designed to cover topics you requested in the survey that was distributed in October. We've tried very hard to address your concerns, but as always, help is available should you need it.

Session 1 is designed to be a quick refresher on Salesforce.com basics and an overview of the program. Session 2 will be more independent work with some guided practice to let you get familiar with the most common uses of Salesforce.com. By the end of Session 2, you will have lots of information and hands on experience to start working. Here's what we'll cover in each session:

Session 1: Getting to know Salesforce.com

1. Logging In
2. Understanding each Tab in Salesforce.com
3. Introduction to searching for people in Salesforce.com

Session 2: Working with Searching and Reports

1. Introduction to Custom Reports
2. Saving a Report to your computer
3. Creating your own Custom Report
4. Wrap up

Materials

Instructor Materials

1. Instructor Technology Requirements:
    a. Computer hooked up to projector, wireless mouse
    b. Internet Access to Salesforce.com
    c. Installation of Salesforce.com Microsoft Office Edition

2. Instructor's Powerpoint Presentation (*Appendix D*)
3. Instructor Guide
4. Username/Password list (not included in this report)

Student Materials

1. Student Technology Requirements:
    a. Computer with Internet Access to Salesforce.com
    b. Salesforce.com Username/Password
    c. Installation of Salesforce.com Microsoft Office Edition
2. Student Guide
3. Handout: "*How to use Reports in Salesforce.com*", Session 2 (Next Page)
4. Summative Evaluation, Session 2 (*Summative Evaluation Survey*)

How to use Reports in Salesforce.com

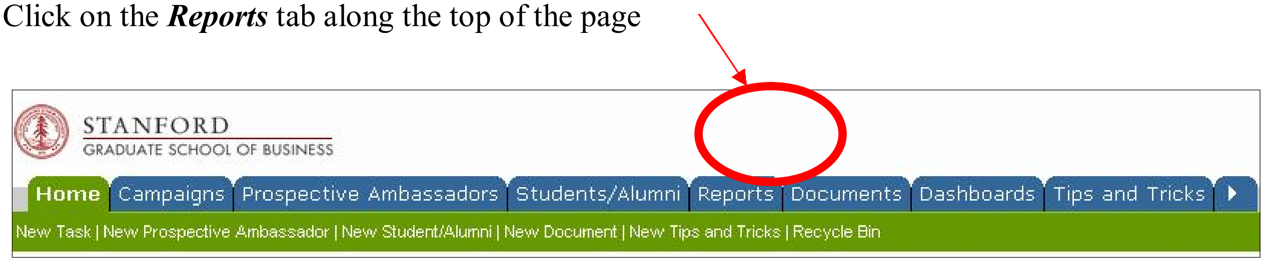
This document will help you quickly access information about students and alumni to get the information you need. We have created several "pre-made" reports which you can use as a template to drill-down to the specific information you need. Here's how to do it:

1. Log in to Salesforce.com: https://www.Salesforce.com/login.jsp Type in your **username** and **password** or use this information for the general account:

Username: salesforce_user@gsb.stanford.edu
Password: password

Finding Reports in Salesforce.com

Click on the ***Reports*** tab along the top of the page

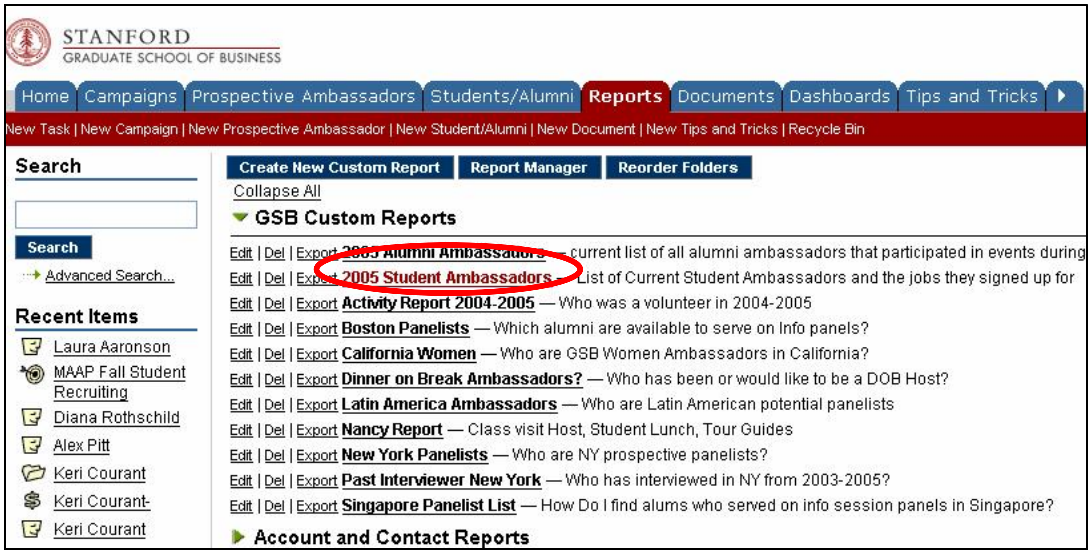


At the top of the reports page, you'll see several reports under the ***GSB Custom Reports***. These reports are your templates from which you can start looking for the information you want. If you would like another template created, please contact your admin.

Using Reports in Salesforce.com

3. Click on the hyperlink to access a report.

In this example, use ***2005 Student Ambassadors*** Report



This report shows you all of the current student ambassadors and the jobs they volunteered for, sorted by GSB Class Year. You know have the power to get the information you need in several different ways. You can either download the entire report to Excel or work with it there (Option 1) or you can customize the report within Salesforce.com to suit your needs (and still download it if you like). This tutorial will break down into 3 sections

1) **Exporting all results to Excel and using Excel to do a simple search** (all students that signed up for a Campus Tour Guide)

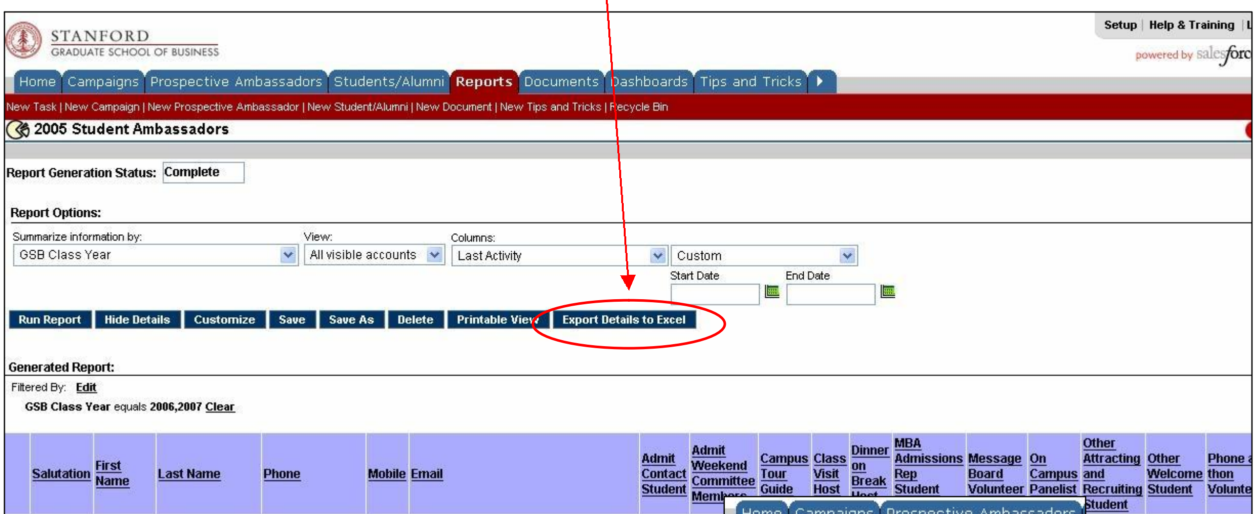
2) **Simple search based on an activity** in Salesforce.com (all students that signed up for a Campus Tour Guide)

3) **Complex search using filters in Salesforce.com** (all students from GSB Class year 2006/2007 that have signed up to be part of the Phone-a-thon, Dinner on Break Host, and Prospect Student Contact)

PART 1: Exporting to Excel

If you only wanted to know who has signed up for a Class Visit Host, you can export the full report to *Excel* and sort the data from *Excel*. To export the report, it's quite simple.

1. Press the **Export Details to Excel** button



2. Press the **Export** button

3. Choose "**Open with Excel** (default)".

4. Press the "**OK**" button and the full report will open in *Excel*

Working with your report in Excel

Now your report is open in *Excel*. Salesforce tries to make your life easy by adding ***autofilters*** to each column of data. This is an excellent way to quickly narrow down your data based on one variable. But before you change the report at all, you should save a copy of it first.

PLEASE NOTE: Salesforce automatically makes *Excel* files save as webpages instead of a spreadsheet. Make sure you change this before saving! (Step 4 below)

Saving your Report

1. Press **File→Save As**

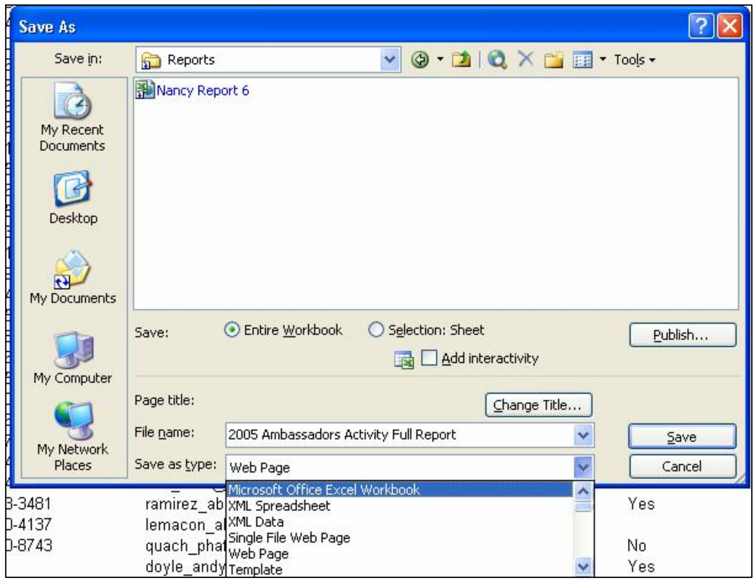
2. Find your Documents folder

3. Rename the report to something that makes sense to you (such as *2005 Student Ambassadors Full Report)*

4. Change the **"Save as type:"** from **Webpage** to **Microsoft Office Excel Workbook.**

   <u>THIS STEP IS CRITICAL!</u>

5. Press the **"Save"** button.



Now you're ready to start sorting your report

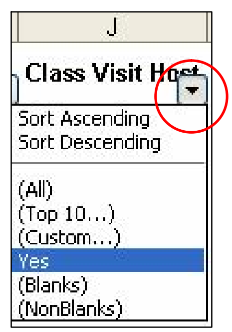
Using Autofilters to find data

Autofilters allow you to quickly filter your data by a specific condition. Salesforce adds them automatically to your spreadsheet in the form of a little down arrow in the lower right hand corner of the header cell. It is very easy to use.

For example, if you only want to see students who volunteered to be a Class Visit Host, you can autofilter all records to show only students with "Yes" in that column. Here's how:

1. Move over to the **Class Visit Host** column

2. Click on the autofilter arrow and choose the condition you want to filter by. For this example, use "**Yes**"



Now your data only shows only students who said Yes. To return it back to all students, click on the autofilter arrow and select "**(All)".**

You can still sort the data in Excel using the **Data→Sort** feature without using autofilters. In fact, you can remove the autofilters entirely if you find them unhelpful by simply going to **Data→Filter** and remove the check mark next to Autofilter.

PLEASE NOTE: Filtering multiple columns performs an AND THEN filter. So if you autofilter by "Class Visit Host", and *then* by "Student Lunch Host" you will only get students who said "Yes" to first Class Visit and THEN "Yes" to "Student Lunch Host". If you want to filter students by conditions using OR, then you'll need to do that in Salesforce.com. Read on!

Part 2: Using Salesforce.com to customize your Reports

Salesforce.com Reports give you the power to customize existing reports, as well as creating your own. This section will show you how to do two tasks using the ***2005 Student Ambassadors*** report:

1. **Customize the report to only show students who signed up for 1 activity—single criterion** (eg: Campus Tour Guide)

2. **Customize the report to show students who signed up for several activities—multiple criteria** (eg: Students from GSB Class Year 2006/2007 that signed up for the Phone-a-thon, Dinner on Break Host, or Prospect Student Contact but not necessarily all).

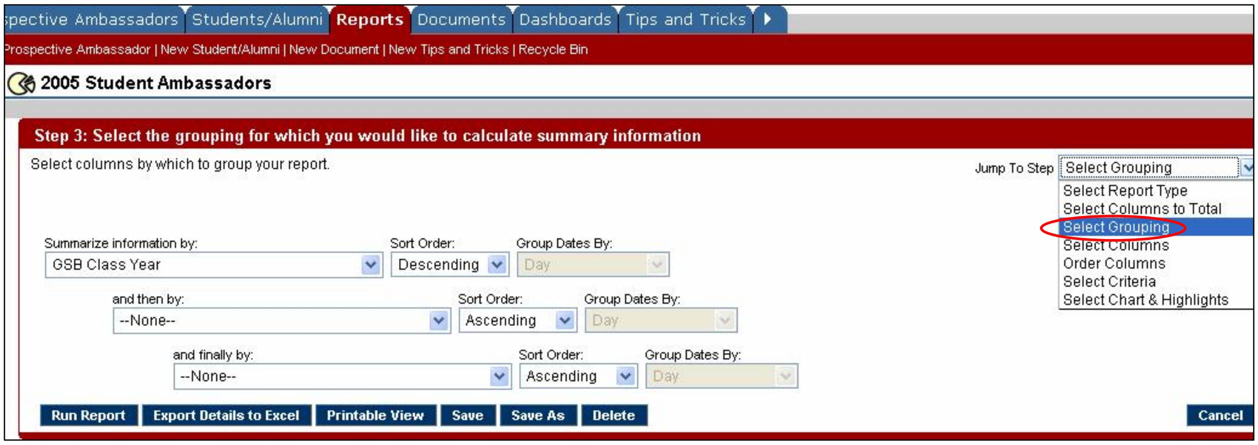
Customizing your Report by a single criterion

Let's get back to working in Salesforce.com. Log back in if you need to, and click on the ***Reports*** tab. Under ***GSB Custom Reports*****,** click on the hyperlink ***2005 Student Ambassadors***. Now we're going to use the **Customize** feature of reports to filter down to only the information we want.

1. Click on the  button

You will be presented with several possible steps to customize your report. You can either use the pull-down menu to go directly to "**Select Columns"** or you can use the **"Next"** button to move step by step through the filter report. As you practice with your reports you can skip straight to the step you want. For this example, we'll walk through each part.

2. Use the "**Jump to Step"** menu to go to Step 3: Select Grouping



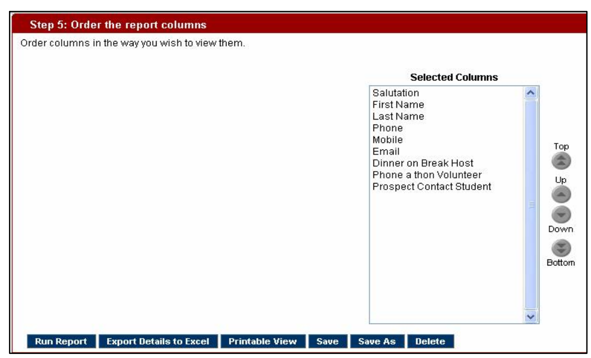
Grouping allows you to cluster your results by a specific condition, such as GSB Class Year. The current report is setup to group your data based on GSB Class Year. You can either keep this or remove it.

<u>NOTE</u>: Don't group based on Last name or First name in Salesforce, use Excel to sort by Name after you export your report.

3. Use the **Next** button or **Jump to Step** to move to "**Step 4: Select Columns"** This is where you choose which variables you want data on. You can have your report have all activities or just certain ones you'd like information on.

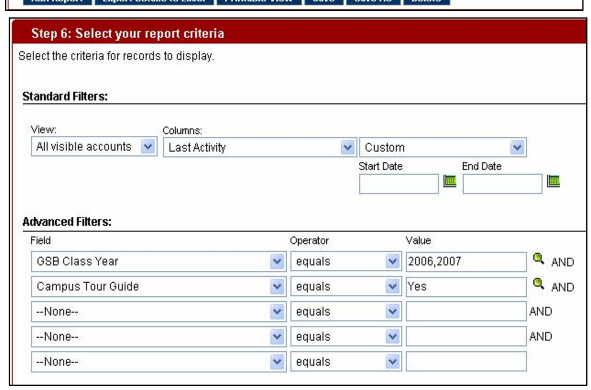
4. Under **Student/Alumni Custom Info** put a check mark next to the variable you want. In this case we'll simply select "Campus Tour Guide" and press **Next**

5. **"Step 5: Order Report Columns"** allow you to sort the columns in whatever order you like (you can also do this in Excel after you export your report, so it's not critical). Press **Next**



6. "**Step 6: Select your Report Criteria.** This is where you choose how you want to filter your results. Notice GSB Class Year is already equal to either 2006 or 2007 since this report focuses on current students

We want people that signed up for "Campus Tour Guide" with a value of "Yes".



7. Pull down the **Field** list and find **Campus Tour Guide** (look under **Student/Alumni Custom)** and for **Value** type "Yes" or click on the Magnifying glass to see possible values

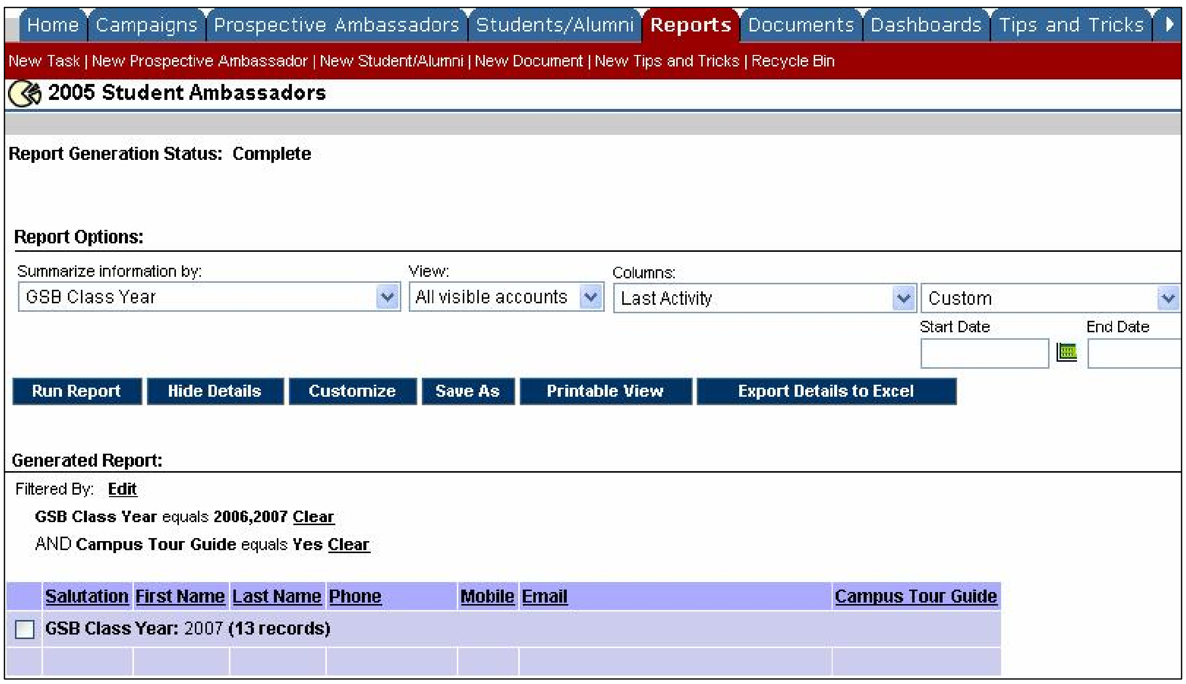
8. When you're finished press **Next** to go to Step

7

9. **Step 7: Select Chart Type and Highlights.** This is really advanced report styles that you don't need to worry about at the moment.

10. **FINAL STEP:** Press the **Run Report** button (top right, lower left or lower right corner, its hard to miss!)

You now will have a list of students sorted by GSB Class Year that have volunteered to be a Campus Tour Guide. Now you can either go back and change your report by pressing **Customize** again, or you can **Export Details to Excel** and save the report that way. (click here for instructions on exporting to Excel)

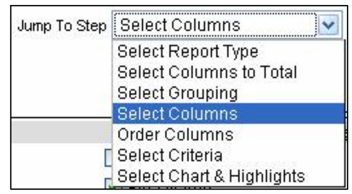


Ok, that was pretty simple, but you really want to get a report that filters by multiple activities. The steps are exactly the same, but we'll use the advanced filters in Salesforce. Here's how:

Customizing your Report by multiple criteria

We're going to use the same report as in the last example, the ***2005 Student Ambassadors*** report. If you still have it open, you can start working on it again. This time we'll only hit two steps: **Step 4: Select Report Columns** and **Step 6: Select your Report Criteria**. In this example, we'll limit our report to show people that signed up for an or all of: "Dinner on Break Host", "Phone-a-thon Volunteer", and "Prospect Student Contact".

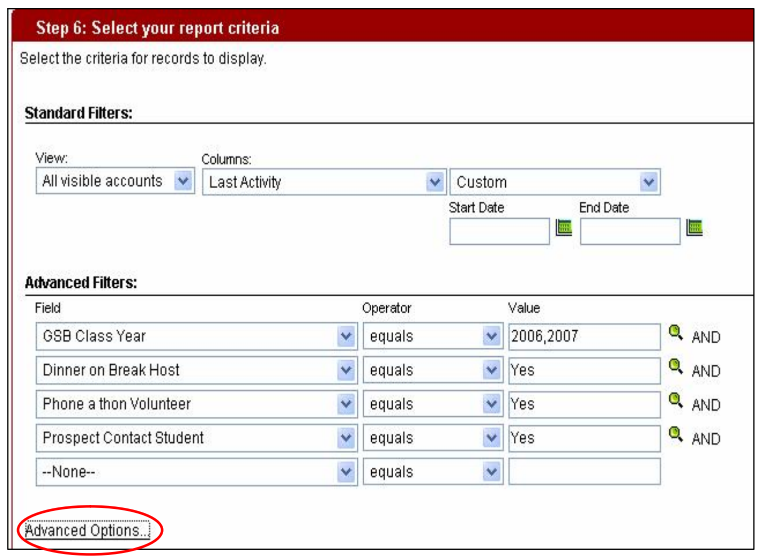
1. Open the ***2005 Student Ambassadors*** report and press the **Customize** button.



2. On the **Jump to Step** menu, choose **Select Columns** (Step 4)

3. Under **Student/Alumni Custom Info** put a check mark next to the variables we you want. We'll use "Dinner on Break Host", ""Phone-a-thon Volunteer", and "Prospect Contact Student" for this example. (hint: use **Deselect All** to uncheck all variables quickly)

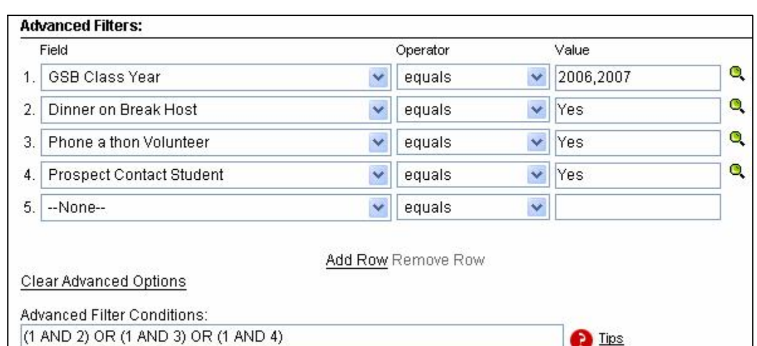
4. On the **Jump to Step** menu, choose **Select Criteria** (Step 6)



5. Choose each of the variables we want (leave GSB Class Year alone since we want only current students) "Dinner on Break Host", ""Phone-a-thon Volunteer", and "Prospect Contact Student" and make them "Yes"

6. Click on the **Advanced Options** link underneath the criteria boxes.

The **Advanced Options** lets you define relationships between your filters. For our example, we always want GSB Class Year to either be 2006 or 2007. However, for the other conditions, we don't want people that only have "Yes" to all 3. We want people that said yes to any combination of the 3. To do this, we have to set conditions using OR statements. Here's how:



7. Under **Advanced Filter Conditions** type in **"(1 AND 2) OR (1 AND 3) OR (1 AND 4)"** This will then select records that satisfy the conditions we want.

8. If you need help on filter syntax, click on **Tips**

9. That's it! Click on the **Run Report** button and survey your results. If you made a mistake, just go back to the **Customize** button and review the conditions you set. If you like, you can export it to Excel as well.

CONGRATULATIONS! YOU'RE WELL ON YOUR WAY TO MASTERING REPORTS!

Implementation

Instructional Delivery

In order to have a successful training session, the facilities needed to allow the instructor to show information on a screen that is easily viewed by all participants while they work on their own individual computers. In addition, the arrangement of the computers should allow for collaboration between participants and informal assistance during the session, as well as easy walking access for the instructor to move about the room. A large part of the instruction will involve individual guided learning, thus it's critical that the instructor is able to reach each participant and address issues from any part of the room. Wireless keyboard and mouse access to the computer in the front of the room would allow for maximum flexibility during the training sessions. The goal is to create a more collaborative learning environment as opposed to a lecture-style information dissemination setup.

The instruction will take place in the computer lab located in the basement of the building. The computers are arranged in rows behind the projector screen, and setup with the same software as the office computers. Each of the 20 computers has internet access and has been tested to ensure that it has access to Salesforce.com. In the front of the room is a large screen complete with an LCD projector and light switches to control the viewing environment. The instructor can either use an existing computer or bring a laptop and use a Cat5 plug to access the internet. There are no special codes or other network requirements needed to use gain access to Salesforce.com from the lab. A wireless mouse and laser pointer are recommended for the presentation.

Additional materials that may be needed are pens for filling out notes and the final survey, a table for materials distribution, and a stapler in case it is needed for packets. In addition, a few little give away prizes for participation in the training and answering questions will be given away.

Scheduling

Each session will require approximately 15 minutes setup time to get the LCD projector and presentation setup. For each hour-long session, 2 hours should be reserved, with 30 minutes prior and after to allow for setup and take down, and any questions that keep me after the 1 hour time allotment. Because the lab is not used daily, scheduling the 2 hour blocks should not present an issue.

Materials

Each participant will need a packet that includes the Student Guide, the Handout "How to Use Reports in Salesforce.com", and the final evaluation form. All of these will need to be photocopied and hole-punched and put into a binder before the session begins. The office has all of the necessary materials required for doing this. There are no other materials the participants will need for the training session.

Evaluation

Formative Evaluation

Based on the information gathered from the needs assessment and my own exploration of Salesforce.com, a sequenced set of learning objectives was created. Several conversations with my boss and another participant in the training program helped to hone the materials and sequence to ensure that I was addressing the most relevant issues mentioned in the surveys and interviews. During this period, individual users also came to me to get assistance with specific problems they encountered, giving me further information about the content and skills that needed to be covered. I realized at this point that working with reports would be a major focus of the training and decided to dedicate an entire session to reports, and develop an electronic tutorial to use for training and reference material. This forced me to re-sequence and outline the materials to allow for separate training sessions. The results of that process can be found in my task analysis and ISD grid.

To flesh out the outline into detailed training instructions, I took each task and sub-task and developed a tutorial outline. This lesson outline was rehashed several times based on time and sequence revisions discussed again with some participants in the office. The final result became two, 90-minute training sessions detailed in the Instructor's Guide.

Finally, the second training session was designed to allow for a great deal of guided independent learning and exploration to allow participants to venture deeper into Salesforce.com. The instructor's role was largely converted from speaker to expert tutor as participants completed self-paced guided instruction. To accomplish this, a customized guide to using and creating reports was made. "*Using Reports in Salesforce.com*" was designed and revised multiple times with feedback from my boss and another participant. They were kind enough to actually read and attempt the tutorial, and give me feedback on clarity, missing items, and general readability. A major revision in the handling of exported report results was added to ensure that participants understood some idiosyncrasies discovered in Salesforce.com. More pictures and graphic instructions were also included to be certain the descriptions made sense. The resulting tutorial was twice as long but more comprehensive and user-friendly. With this completed, the instructional portion of the training was ready to go.

Summative Evaluation

Summative Evaluation Plan

The end-of-training survey was designed with two main foci in mind: 1) To determine how informative and useful the group training sessions were and 2) Identify gaps between the training session topics and the information users need to complete their jobs. With these two goals in mind, I designed the survey to capture information about the content, delivery, setting and attitudes toward the training sessions.

The instrument is broken into three different sections designed to gather both quantitative and qualitative data. Participants were asked to evaluate all parts of the instruction on a Likert-type scale (with the middle choice omitted to force them into expressing an opinion) to establish an overall snapshot of the training. Part 2 of the survey was intended as a self-assessment as to whether or not the participant felt comfortable completing a list of tasks. Each task was a focal point in the training, and the hope is to identify strong and weak areas of the training sessions to improve future content. The final section of the of the survey was all short answer which sought to get overall impressions and attitudes about the training and give participants a chance to give written feedback.

In addition to the written evaluation, the instruction is designed with mini-tasks for each participant to complete, which will give the instructor a sense of how well each topic was covered during the presentation. Participants will also be using and evaluating the tutorials developed to support the course and their post-training job tasks. No formal observations will take place, but the instructor will have his observations of the participants working on the in-class examples to gauge their understanding and the instructional quality.

The written evaluation will be distributed to participants after they complete the final training session. Each session is currently scheduled 2 days apart, which should allow them some practice time with the skills they've learned in each session. Thus, when the training is complete, they will have had real-world experience applying their skills and well suited to evaluate the effectiveness and comprehensiveness of the sessions.

Analysis of the data will be percentage scales for the Likert-scale items, and content analysis for the short answer questions. The goal will be to have at least 85% of the participants stating they feel comfortable performing each task. Any area that falls behind will identify an area of the materials and training to be examined to ensure comprehension. It will also help indicate which subjects could be taught in subsequent sessions, be addressed in online tutorials, and help establish what topics may need to be re-examined with particular individuals one on one.

The evaluation and training did not take place due to the termination of the project before the training session took place.

Summative Evaluation Survey

Directions: Please fill out this survey to help evaluate the Salesforce.com training program you've been participating in. Your answers will help to improve the program and ensure that all participants are comfortable with using Salesforce.com

Group Training Sessions

Directions: Please select the answer that best describes your experience.

1. The Salesforce.com training sessions gave me a good introduction to using the program:

   - ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

2. The instructor's presentations were clear and the topic:

   - ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

3. The training examples used by the instructor in the training were relevant to what I want to achieve in Salesforce.com

   - ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

4. Adequate time was allotted for me to complete the example exercises:

   - ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

5. After completing the training sessions, I feel confident I can apply these skills to complete your job responsibilities successfully:

   - ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

6. Overall, the training session(s) were effective and efficient and helped you understand how to use Salesforce.com:

   - ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

7. The time spent in the training sessions was a good use of my time and will be helpful in my job:

- ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

8. The computer room and presentation screen setup were conducive to learning:

   ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

9. The materials and tutorials provided were clear and easy to use:

   ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

10. The instructor was able to answer all of my questions either during the session or during the help time afterwards:

    ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

11. Overall, the instructor did a good job presenting information and allowing for hands-on time learning:

    ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

12. Other comments on the training sessions:

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Skills Learned

The goal of the training was to introduce several key areas of Salesforce.com and to give you time to work with the program.

After participating in training, please rate how ***confident*** you are in completing each task:

1. Log in to Salesforce.com and find the GSB page.

   ❍ Completely Confident ❍ Somewhat Confident ❍ Not very Confident ❍ Don't know how

2. Search for students or alumni in the database by name, city or other characteristic

   ❍ Completely Confident ❍ Somewhat Confident ❍ Not very Confident ❍ Don't know how

3. Understand the difference between Prospective Ambassadors and Students/Alumni and be able to search in the appropriate area.

   ❍ Completely Confident ❍ Somewhat Confident ❍ Not very Confident ❍ Don't know how

4. Locate the "Tips and Tricks" help files to find tutorials on common tasks.

   ❍ Completely Confident ❍ Somewhat Confident ❍ Not very Confident ❍ Don't know how

5. View a pre-made report and save it to Excel

   ❍ Completely Confident ❍ Somewhat Confident ❍ Not very Confident ❍ Don't know how

6. Apply a filter to a pre-made report to limit the results

   ❍ Completely Confident ❍ Somewhat Confident ❍ Not very Confident ❍ Don't know how

7. Create your own custom report and export it to Excel

   ❍ Completely Confident ❍ Somewhat Confident ❍ Not very Confident ❍ Don't know how

8. What other skills or topics did you feel were important?

____

____

____

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Overall Impressions

1. If you could change something about the training sessions, what would you change?

2. Was there something that wasn't covered that you would like to have included in a training session? Were you able to find the answers to this problem in the help section? Please explain.

3. Overall, what was your satisfaction level with the training, the instructor, and the information presented? The goal is the make the training even better, so if there were things you felt were left out, please explain.

Thanks for your taking your valuable time to answer these questions. They will be compiled and sent out to everyone in the next few weeks. Your answers will help to improve future sessions and ensure that the most important information is available to you in the help files. Remember, you can always set up an appointment with Menko if you need to get extra help.

Self-Assessment

Rarely does the opportunity to really apply your learning directly and get some real-world experience. Yet, two weeks after the course started, I was presented with that challenge, and have spent the last few months doggedly attempting to apply and expand my learning while managing a large training project. While this often leads one to aggravation and overload, it was great to have a serious challenge and feel that I was putting my energies into something worthwhile. Instead of fumbling through the morass of the project, I used our coursework as a compass to guide me through it and design some high quality products and training.

The first observation about this entire project is that micro analyzing required to complete some of these assignments often forced me to look deeper at each aspect of the whole in more depth than I may have liked. It was similar to the training I received in lesson-planning—making an incredibly detailed outline for a 90 minute lesson that takes 10 hours to make. As I tried to apply this rigor to my project, I also found that it was very challenging to make timelines imposed by the graduate school. Often I'd be skipping ahead several sections to develop a portion of the project required at the moment for my job and end up having to go back and re-analyze for the class. I came to see that while the level of detail required by the course is instructive, it's hard to complete at least under the time constraints imposed upon me. However, its probably similar to teaching in that the more times I create a project like this, the fast the process becomes and easier it flows, similar to lesson planning after a few of those.

Completion of this project also revealed to me how difficult it can be to manage and organize a large, multi-faceted project all on your own. While working for the GSB, I was also in charge of customizing the back end, creating web-based surveys that integrated directly into Salesforce.com, as well as the instructional design and content creation for the help files. All of this while still learning to use the program itself, compressed into essential 8 weeks of employment. While it had been expected that I would stay on longer, the project was terminated due to other issues outside the department. So while I invested a great deal of work into getting the system prepared for use and designing materials and instruction, all of that effort was negated when the department stopped development. This was my first taste of the consultant blues when the end of a project is also the end of a job. For all that, I found that trying to manage every portion of the project and complete any one of the tasks I was dispatched to do was extraordinarily difficult. For future projects of this scope and magnitude, I would need to design some kind of graphical progress sheet or table that tracks where each portion of the project is, how its progressing, and what still needs to be done. While our textbook came with Microsoft Project, we did not use it in class, and honestly I did not have the time for an individual exploration of the software. Still, I think that sort of management is something I'm not accustomed to doing, and would need to improve to tackle a project of this magnitude again without letting pieces slip through the cracks.

Overall, as I come to complete this project, I feel that I labored hard to make all of these pieces come together, and while I did not get to actually see the project to fruition, I am proud of having tried to do it, even if it did not work out. While this behemoth is flawed for sure, it feels like an excellent first try at a rather immense task. I hope that the future will allow me to try and tackle this sort of project again, and that I can use this project as a template or guideline for the next one. Lastly, I wanted to personally say “thank you” for giving me the extra support and flexibility to complete this project to the best of my abilities. While we both knew I would be hard-pressed to integrate my work with the assignments from class, I’m pleased with the result and feel that I was partially successful in synthesizing the two. I could not have done it without your extra guidance and direction.

Appendices

Appendix A: Needs Analysis Survey

Salesforce.com Survey

This survey is designed to simply gather some information about your understanding of Salesforce.com and how it can benefit the office. The goal is to quickly provide diagnostic data that will determine the training I can provide and help me understand what your needs are and customize Salesforce.com to meet them.

<u>Directions</u>: Please color in the circle that best describes you:

1. Have you had a chance to take part in any information/training sessions on Salesforce.com?
   - ❍ Yes ❍ No

2. Do you know how to get to Salesforce.com and log in?
   - ❍ Yes ❍ No

3. Have you had a chance to use Salesforce.com on your own?
   - ❍ Yes ❍ No

4. If yes, how many times have you logged in?
   - ❍ 1-3 ❍ 4-6 ❍ 7-9 ❍ >10

5. Do you feel that you have a good understanding of what the office is using Salesforce.com for?
   - ❍ Agree ❍ Tend to Agree ❍ Tend to Disagree ❍ Disagree

6. What have you used Salesforce.com for (check all that apply)
   - ❍ Add or Edit Student and Alumni Information
   - ❍ Having Contact Information available when traveling
   - ❍ Being able to see what tasks Alums/Students have volunteered for in the past, including notes
   - ❍ Tracking contacts and touchpoints via phone and email in one location

7. How comfortable are you with Salesforce.com's interface?
   - ❍ Comfortable ❍ Somewhat Comfortable ❍ Somewhat Uncomfortable ❍ Not Comfortable

8. Are you interested in learning more about Salesforce.com and how to use it in the office?
   - ❍ Very Interested
   - ❍ Somewhat Interested
   - ❍ Not Interested
   - ❍ Not in this lifetime!

9. Salesforce.com is designed to help manage contact information about students and alumni and share that information real-time with the entire office. Which of the following capabilities would be important to you?
   - ❍ Fast Access to Contact Information while in the Office (1)
   - ❍ Having Contact Information available when traveling (2)
   - ❍ Being able to see what tasks Alums/Students have volunteered for in the past, including notes (3)
   - ❍ Tracking contacts and touchpoints via phone and email in one location (4)

10. Please rank your top 3 needs from the previous question (or add one of your own)

11. From what you understand about Salesforce.com, please describe how it could be most helpful to you in your responsibilities and tasks.

12. Do you have any concerns about using Salesforce.com?
   - ❍ Yes
   - ❍ No

(13) If Yes, please briefly list them below. If would you would like with speak with me about any of them, please feel free to email or stop by.

Appendix B: Needs Analysis Survey Data

Needs Analysis Survey Data

						Questions							
Subjects	**1***	**2***	**3***	**4****	**5*****	**6*****	**7**	**8**	**9**	**10**	**11**	**12***	**13**
S1	1	0	0	0	3	1	1	1	2	1,2,4		1	time to learn
S2	1	0	0	0	2	0	1	1	1	1,3,4		1	time to learn
S3	1	1	1	10	4	3	3	1	3	1,2,4		0	time to learn
S4	1	0	0	0	1	0	1	0	3	1,2,4		1	no need
S5	1	0	0	0	1	0	1	1	4	1,3,4		1	learn
S6	1	0	0	0	2	0	1	1	2	1,2,3		1	support
S7	0	1	0	2	2	0	1	0	2	1,3,4		1	support
S8	1	1	1	5	3	1	2	1	3	1,2,4		1	interface
S9	1	0	0	0	3	0	2	1	4	1,2,3		1	no need
S10	1	0	0	0	2	0	1	1	3	1,3,4		1	interface
S11	1	0	0	0	2	0	1	0	4	1,2,4		1	support
S12	1	1	0	5	2	1	2	1	4	1,2,4		1	interface
Yes Avg:	**91.7%**	**33.3%**	**16.7%**	**1.8**	**2.3**	**0.5**	**1.4**	**75.0%**	**2.9**			**91.7%**	
	traing	log on?	use sf?	# log on	use in the office	interface	comfort	learn more	important feature	rank needs	written needs	concern'	concern category

Legend
*= (0="No", 1="Yes")
**=(1="1-3 1="1-3", 2="4-6", 3="7-9", 4="10+"
***=(4="Agree", 3="Somewhat Agree", 2="Somewhat Disagree", 1="Disagree"
****=number of items sales force has been used for (out of 4)

Appendix C: Needs Analysis Interview Questions

Several members of the staff were informally interviewed to get a better sense of the history, needs and challenges I faced before I began the project. Not all questions were utilized in each session, but the answers provided were used to create and focus the Needs Analysis survey in Appendix A.

Describe the training you have already received in Salesforce.com?

How do you see the office using Salesforce.com?

How do you manage contact information and touchpoints now? If you wanted to find someone to run a session in New York, how do you do it?

Do you feel that Salesforce.com will help you do your job better or more efficiently?

What problems have you had with Salesforce.com?

What factors might prevent you from effectively utilizing Salesforce.com?

How much training have you had in Salesforce.com?

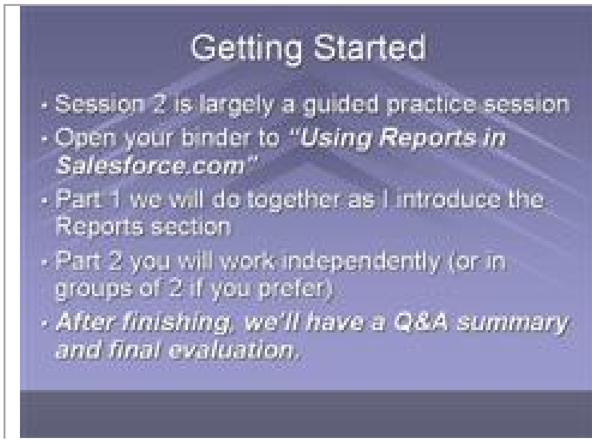
How would you describe the training you had so far? Was it adequate to get you started? IF not what would you like know more about?

How can I help you with Salesforce.com?

Appendix D: Powerpoint Presentation for Training


Session 1 Wrap-up
• Covered basic navigation and function of the parts of Salesforce
• Learned how to search and locate data in both Prospective Ambassadors and Students/Alumni sections of the database
• Learned to edit and add basic pieces of contact information
• Integration of email communication into the contact record


Session 2: Overview
• Topics:
– Advanced searching and filtering building on Session 1
– Reports Tab: Viewing, Editing and Creating your own report to summarize data
– Exporting reports to Microsoft Excel
– Accessing the Documents Tab and Warehousing Documents for viewing by team members
– Finding the "Tips and Tricks" and adding your own
– Community Forums

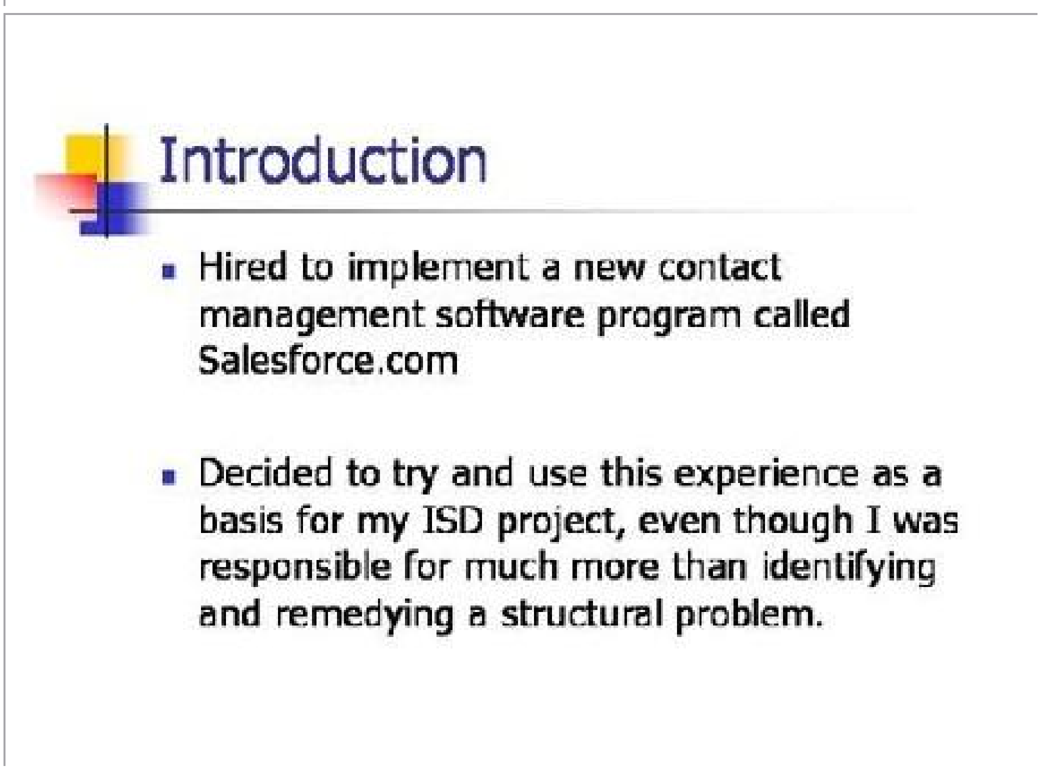

Getting Started
• Session 2 is largely a guided practice session
• Open your binder to "Using Reports in Salesforce.com"
• Part 1 we will do together as I introduce the Reports section
• Part 2 you will work independently (or in groups of 2 if you prefer)
• After finishing, we'll have a Q&A summary and final evaluation.

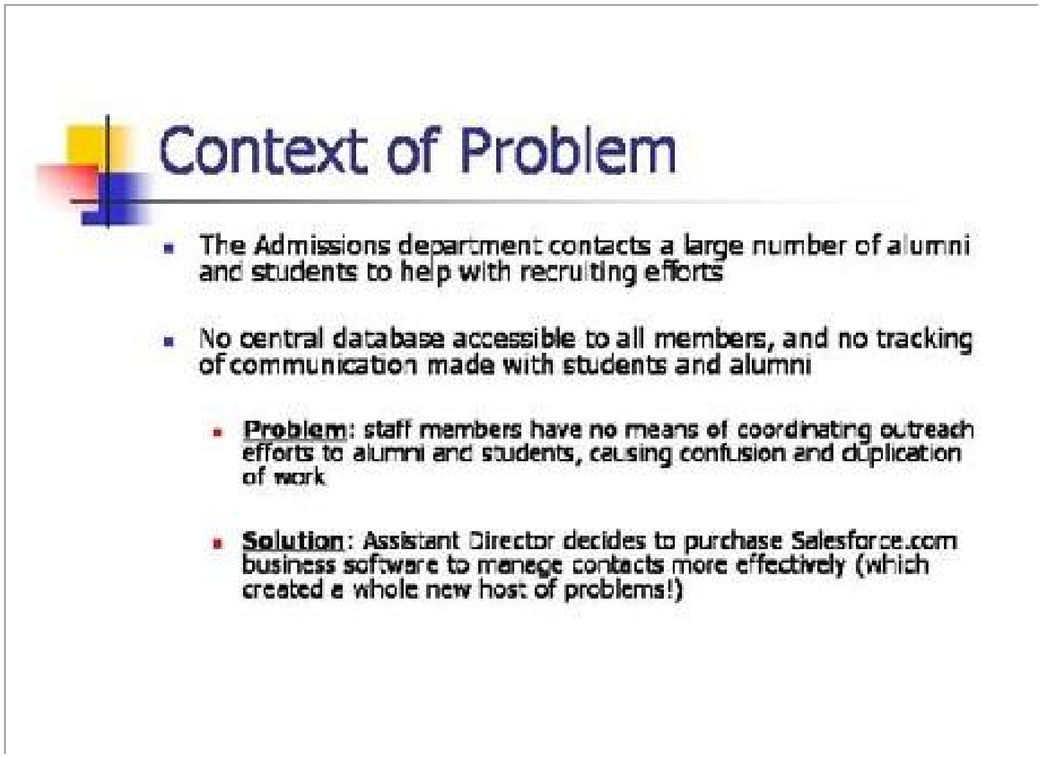

Questions on Salesforce.com?
• What questions do you have for me?
• Do you have a clearer sense of Salesforce.com?
• Where can you get more help?

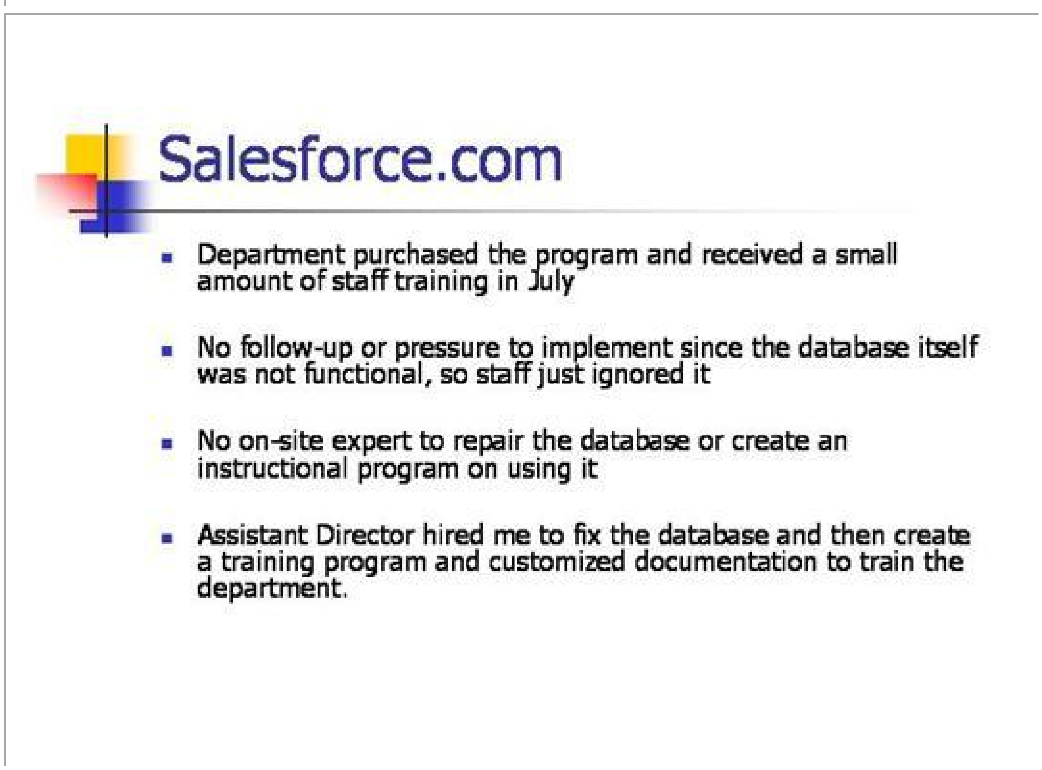

Evaluation
• Please take your time to answer the questions honestly and completely
• We took a lot of time to create the training, and would appreciate your feedback and help in making it even better
• Remember, you can always come for extra help and individual assistance with Salesforce.com


Thank You!
Don't forget to turn in your evaluation and claim your prizes on the way out!

Presentation: Class Summary of ISD Project




Context of Problem
The Admissions department contacts a large number of alumni and students to help with recruiting efforts
No central database accessible to all members, and no tracking of communication made with students and alumni
Problem: staff members have no means of coordinating outreach efforts to alumni and students, causing confusion and duplication of work
Solution: Assistant Director decides to purchase Salesforce.com business software to manage contacts more effectively (which created a whole new host of problems!)


Salesforce.com
Department purchased the program and received a small amount of staff training in July
No follow-up or pressure to implement since the database itself was not functional, so staff just ignored it
No on-site expert to repair the database or create an instructional program on using it
Assistant Director hired me to fix the database and then create a training program and customized documentation to train the department.

Non-Instructional Problems

1. Salesforce.com is a tool designed for companies to maximize customer contact and organization
2. Used by sales representatives to manage and organize leads to generate income
3. University wanted to use it to manage student and alumni contacts to help with recruiting efforts and analyze their effectiveness
4. Program was ill-suited for these needs, and required major restructuring/customization to work

Instructional Problems

Staff need to be able to:

1. **Understand what functions Salesforce.com provides** (and replaces)
2. **Open and Navigate through Salesforce.com to accomplish several tasks**:
   a. Add/Edit contact information
   b. Centralize reporting about contacts (when called, what activities they participate in, donations to school, etc)
   c. Search for contacts based on specific criteria
   d. Generate reports for specific recruiting campaigns

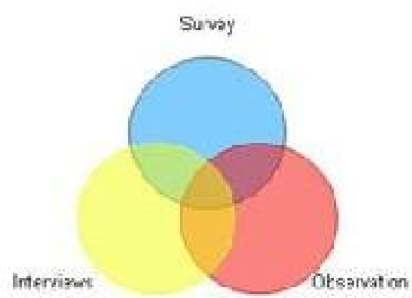
Needs Analysis: Planning

Answer several key questions:

1. Assess general ***Comfort level*** and ***Attitude*** about Salesforce.com in the office (how much of previous training has sunk in?)
2. What ***tasks*** would the staff like to accomplish in Salesforce.com?
3. ***How can*** Salesforce.com effectively handle those tasks?
4. What ***impediments to learning*** exist (physical, technical, emotional)

Needs Analysis: Data Collection

- **3 data gathering methods employed**:
  - Interviews, Survey, & Informal observation
  - Interviews & observation used to gauge environment and design survey
  - Survey instrument designed to focus on learner needs and existing attitudes & perceptions



Needs Analysis: Data Analysis

Analysis revealed several issues/barriers

1. Low adoption and lack of confidence in knowledge of system
2. Positive attitudes towards learning more
3. High level of concern about using program
4. Poor database infrastructure to support the tasks the program is designed to do
5. Lack of imperative to utilize the program

Table 1: Pre-Training Summary of Knowledge, Usage, and Comfort (n=12)

Dimension	# of Yes	Percentage	n
Participated in previous training	11	91.7%	12
Logged onto system since training	4	33.3%	12
Used system to accomplish a task	2	16.7%	12
Interested in learning more	9	75.0%	12
Have concerns regarding use of system	11	91.7%	12

Table 2: Pre-Training Impediments to using Salesforce.com (n=13).

Dimension	# Resp.	Percentage	n
No time to learn program	4	[illegible]	13
Not comfortable with interface/layout	3	[illegible]	13
Not enough support to use	5	[illegible]	13
Program not necessary to do tasks	2	[illegible]	13

Instructional Solution: Goals

1. Raise learner confidence and competence
2. Motivate learners to engage in learning and practice using the program
3. Create support structure for users consisting of customized documentation and learning spaces to exchange ideas and issues.
4. Create a self-supporting community that can continue to use Salesforce.com after my training and support

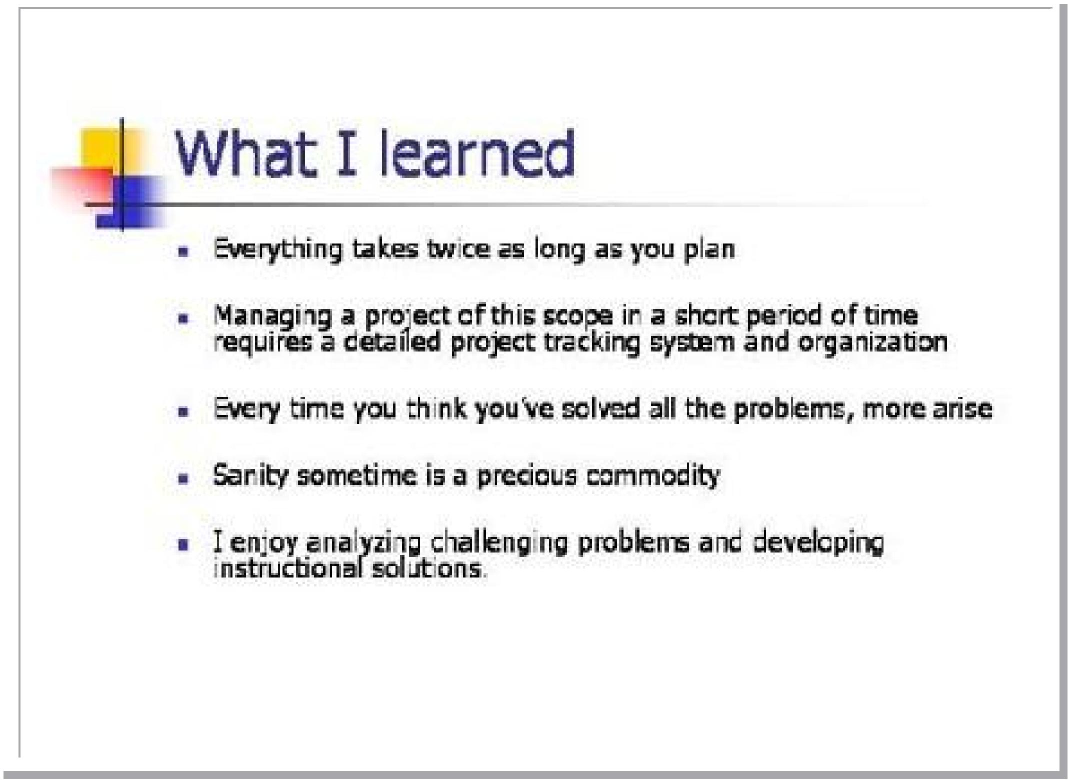
Instructional Solution: Products

- Designed two 90-minute training sessions
- Combined conceptual information with hands-on, contextually-relevant tasks that mirrored actual tasks they would perform
- Created several tutorials and other support documents
- Provided individualized assistance for extra support

Instructional Solution: Training

5 key areas (2 x 90-min Sessions)

1. Comprehend Organization and Navigation of Salesforce.com
2. Search for records in the database by specific contact name
3. Search for a group of records based on a single criteria
4. Utilize Reporting capabilities to find and filter records based on specific criterion and export them to other applications
5. Understand how to access documentation, tips, user forums, and stored documents within Salesforce.com


What I learned
Everything takes twice as long as you plan
Managing a project of this scope in a short period of time requires a detailed project tracking system and organization
Every time you think you've solved all the problems, more arise
Sanity sometime is a precious commodity
I enjoy analyzing challenging problems and developing instructional solutions.