

Salesforce Basics

120 minutes with 15 attendees seated Classroom/Theater style.

Outcome: Make a connection between good data in, good data out.

Needs Analysis Checklist

4

Before participants begin to learn about new topics, sometimes it is helpful for them to gauge how much they know.

Fill Out Your Needs Analysis Checklist:



Advanced Prep

Develop a *Needs Analysis Checklist* that includes specific knowledge, skills or abilities that you will be covering during your session.

Instructions

1. Welcome everyone to the session and explain the organization's decision to switch from our current database to Salesforce.
2. Explain that we'll begin by conducting a brief Needs Analysis to identify how comfortable people are in entering data in a new way.
3. Distribute a *Needs Analysis Checklist* to each participant.
4. Participants should use green highlighters to mark items on the *Needs Analysis Checklist* that they feel they are strong in already.
5. Participants should use pink highlighters to mark items on the *Needs Analysis Checklist* that they feel they may need to improve.
6. Ask several participants to share where they feel their strengths and/or improvement opportunities lie, then summarize any trends you notice and share how you will be touching on those items throughout the rest of the session.

Materials

- **Pens:** Not everyone brings something to write with
- **Needs Analysis Checklist:** A checklist to help participants identify how much they know about the topic.
- **Pink and Green Highlighters:** Highlighter for each participant
- **Voting Dots:** Nothing special here. Just colored dots stickers.

Outcome: List the correct steps in the procedure to accurately enter data into Salesforce.

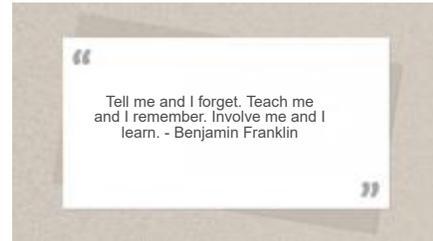
Share A Quote

4

Draw participants' attention by using a line from a poem, a proverb, an expert in the field or a wise saying.

Advanced Prep

Find a quote that is related to the outcome.



Instructions

1. Point out that participants have just taken an assessment which will hopefully help them hone in on the most important parts of today's session for each of them individually.
2. Show this proverb: Bad data in, bad data out
3. Ask some or all of the following (and/or insert your own questions):
 - What's the importance of these 6 words?
 - What if we flip it: Good data in, good data out? How do we get there?

Outcome: Make a connection between good data in, good data out.

Storytelling

18

Tell participants a prepared story to present content.

Advanced Prep

1. A good training story is concise and well structured. To prepare your story, use the STORY structure.
 - Set the stage
 - Tension
 - Options
 - Resolution
 - Yes



Instructions

1. Read or recite your story using the STORY model to organize your thoughts and to keep your story focused on the Outcome:
 - S = Set up your story: What brief history or context do you need to provide?
 - We're all busy people, handling multiple responsibilities, many of which have tight deadlines.
 - We have a lean organization with very little administrative support.
 - We're all responsible for entering data into Salesforce in one way, shape or form - at various points along the sales funnel process.
 - T = Tension: What problems were present that needed to be addressed?
 - About a year ago, during a particularly intense period of growth, some of the reports we were generating began to look funny.
 - Some of the campaigns seems overly optimistic, other dependable sources of revenue began to fall by the wayside because reports we generated were deprioritizing those options.
 - O = Options: What were the various things that could have been done in order to address the problem(s)?
 - One of our newest salespeople began to dig around and realized that information from new prospects wasn't being captured correctly. Information was being logged into the wrong field (if it was being logged at all) and was leading to erroneous data in the reports that were generated.
 - Obviously we could keep doing what we were doing (skipping over fields which led to inaccurate reports) or we needed to go back, enter all of the correct information - even if it set us back several weeks because of the time it would take.
 - R = Resolution: How did the situation turn out? Is there anything you would have done differently?
 - Obviously, we need accurate information in order to serve our prospects as well as our current customers well.
 - Let's not skip over fields when entering information in Salesforce.
 - Y = Yes: Does this story directly related to the outcome you are trying to achieve. If the answer is yes and you have met the S, T, O, and R, you have a story you should use.
2. Ask some or all of the following questions:
 - How many of you have used Salesforce in other jobs/organizations?
 - What are some of the keys to making sure the data is clean?

Outcome: List the correct steps in the procedure to accurately enter data into Salesforce.

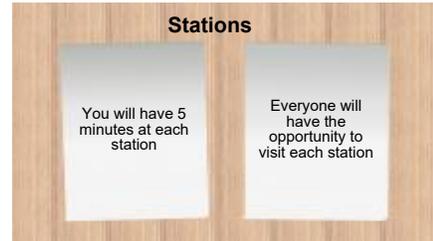
Stations (Of Steps)

18

Expose participants to each step in the procedure in a very short amount of time.

Advanced Prep

Set up several stations around the room, one for each step of the procedure. Each station should feature visual aids, handouts, or relevant training items applicable to the step. You can also have experts at each station that are there to describe the procedure and answer questions.



Instructions

1. Divide participants into 4 groups and assign each group a number.
2. Send each group to the station around the room that corresponds to the number you have assigned them to begin learning about the 4 steps to our data entry process in Salesforce.
3. Allow three minutes for each station.
4. After three minutes, ask participants to rotate to the next station.
5. Repeat until participants visit every station.
6. Ask participants to return to their seats.
7. Once everyone has returned to their seats walk around to each station and ask "What did you learn about this step of the procedure?" "How does this step prevent "bad data in"?"
8. Allow time for discussion of each step of the procedure.

Materials

- **Station Materials:** Materials for each of the planned stations

Speed Decisions

13

Sometimes people need to be able to recall information and make recommendations quickly to be effective with the procedure being taught today. Speed Decisions is a timed “test” to see how participants do on their own recalling the steps in the procedure.

Advanced Prep

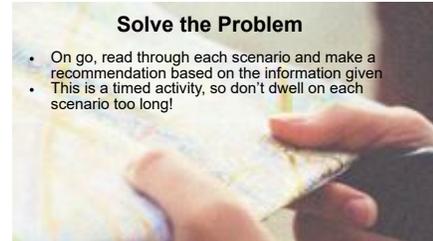
Develop a worksheet with 5-10 real-life scenarios (depending on how much time you have) that will give participants enough information to make a guess or determination on what would be required under the circumstances described in your scenarios. Develop an answer key.

Instructions

1. Explain: we're all busy... and we can't afford to make careless mistakes in our data entry. We need to know these steps like the backs of our hands.
2. Distribute a Speed Decisions worksheet to each participant.
3. Let participants know they will have a limited time to read through each scenario and write in the data entry step that was left out of the scenario.
4. This is a timed activity to assess how quickly and accurately participants may recall the key steps in the procedure.
5. Once the time is up, have participants share their answers with a partner. Ask participants to identify where their answers differ from their partner and justify why they gave the answer that they did.
6. Call attention back to the large group. Share the correct answers and identify where people may have questions about the procedure.

Materials

- **Speed Decisions:**
Develop a worksheet with 5-10 real-life scenarios (depending on how much time you have) that will give participants enough information to make a guess or determination on what would be required under the circumstances described in your scenarios.
- **Pens:** Not everyone brings something to write with



Outcome: Use a new process or tool to generate necessary mailing lists and/or reports.

Demonstration of the Value of This New Process/Tool

4

Use a demonstration to allow participants to see a new process/tool in action.

Advanced Prep

Collect all relevant materials for your demonstration. Prepare relevant questions.



Instructions

- What did you notice about the demonstration that was new or surprising to you?
- What did you notice in the demonstration that is familiar to you?
- What did you see that you are the most excited to implement?
- What did you see that you are uncertain about or have questions regarding?

Materials

- **Demonstration Materials:**
Be prepared for your demonstration with everything you need ready before the session or at a break.

Case Study

18

Participants can be taught new information and concepts by studying true-to-life situations.

Advanced Prep

1. Create a case study by interviewing one or more people who have experience with the process/tool. To pull the story together, make sure to ask:
 - What was the situation at the beginning of the story?
 - What was the impetus for the change?
 - How was the challenge approached?
 - Was there resistance?
 - What was the final outcome?



Instructions

1. Briefly explain that you will be using real-life mini case studies to introduce participants to entering data.
2. Have participants keep the following in mind as they read the case studies:
 - What is the key information that you'll need to capture in Salesforce?
 - Circle it or highlight it.
3. Distribute the case studies and ask participants to read through them.
4. Have participants get into small groups to discuss the case studies and compare the key information they've circled or highlighted.
5. Bring the attention back to the large group and ask for several groups to share what they discussed.
6. Connect these conversations to the use of Salesforce (and the mantra of good data in, good data out).
7. Answer any outstanding questions participants may have.

Materials

- **Custom Data:** Data you've prepared for the session.

Use It

13

Have participants put your content to use in a practice environment.

Advanced Prep

Be sure to have "real-world" materials that participants would be asked to use outside of the training environment available for practice.

Instructions

1. Have participants log into the sandbox environment in Salesforce.
2. Individually, have participants enter the data from the case studies.

Outcome: Make a connection between good data in, good data out.

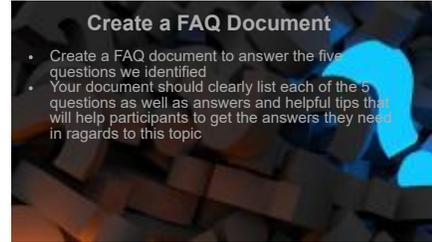
Create A FAQ Document

13

Create a document that answers questions that someone new to this topic would have.

Advanced Prep

Prepare flipchart. Have materials ready for each group to use to create their FAQ documents.



Instructions

1. Ask participants: What questions would someone new to Salesforce have? Call on participants to share their thoughts and record the brainstormed questions on a piece of chart paper.
2. After participants have created a sizable list, pass out 5 voting dot stickers to each participant. Invite participants to come up to the flip chart and place their 5 voting dots next to the 5 questions that they believe will be the top 5 questions that people have about this topic.
3. After participants have had time to vote, identify the top 5 questions with the most votes. Mark these five questions on the chart paper.
4. Tell participants that they will be working in groups of 2 to 3 to create a FAQ document to answer these five questions. Their document should clearly list each of the 5 questions as well as answers and helpful tips that will help participants to get the answers they need in regards to this topic.
5. Allow participants time to work in their small groups on their FAQ documents.
6. As time allows, ask each group to share an answer to one of the FAQ questions and allow others to comment on the answers.

Materials

- **Paper:** Pretty easy to find some paper. If you forget it, ask around.
- **Flip Chart:** Flip chart paper allows you to collect what is happening in the room and record
- **Markers:**
We like Mr. Sketch markers, but you can use whatever markers show well and don't write through multiple layers of paper.
- **Voting Dots:** Nothing special here. Just colored dots stickers.

Outcome: Use a new process or tool to generate necessary mailing lists and/or reports.

Individual Reflection

4

Allow participants time to individually reflect on what they have learned.

Advanced Prep

No advanced preparation needed.

Instructions

1. Ask participants to take several minutes to reflect on what they learned about the way we'll be using Salesforce and how it can be used when they return to their work. Ask them to write these thoughts down.
2. In small groups, allow participants time to share their individual reflections.
3. In the large group, ask for several volunteers to share their reflections.

Materials

- **Paper:** Pretty easy to find some paper. If you forget it, ask around.
- **Pens:** Not everyone brings something to write with



All Materials

- Pens
- Needs Analysis Checklist
- Pink and Green Highlighters
- Voting Dots
- Paper
- Flip Chart
- Markers
- Station Materials
- Speed Decisions
- Demonstration Materials
- Custom Data