

# **CedMA CONFERENCE 2021**

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***Building Advocacy To Drive Transformation Across  
the Customer Lifecycle***

***Amy Regan Morehouse***



## Building Advocacy To Drive Transformation Across the Customer Lifecycle

Amy Regan Morehouse  
SVP Trailhead Academy  
Salesforce

 amyregmore

 /amyregmore4



# Thank You

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# Nice to “Meet” You

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## Trailhead Academy

SVP, Trailhead Academy  
WEF, CLO Committee  
TSIA, Education Services  
Advisory Board



## Wife & Mother

Married to Bryan (22 yrs)  
Mom to Morgan & Danik (15 yrs)  
Half Moon Bay, CA



## Career

Bay Area based, but  
global leadership roles in  
Education, Product,  
Events, Marketing, GTM



## Volunteer

Sea Crest School  
Galileo High School  
National Charity League  
Faithforce Exec Advisor



Amy Regan  
Morehouse



## Salesforce ‘KOA Club’

Since 2007 (13.5 years)  
Trailhead - EBC - High Tech  
& Product Marketing



## Joy

Friends, Outdoors, Karaoke,  
Disco Balls, Meditation &  
Ah-Ha Moments



# Who is Salesforce?



Staying True To Our Values As We Have Grown

## Guided By Our Values



## Doing Well & Doing Good



**\$21.5B**  
**#1 CRM**

FY21 Revenue

## Business Is The Greatest Platform for Change

1:1:1 Model

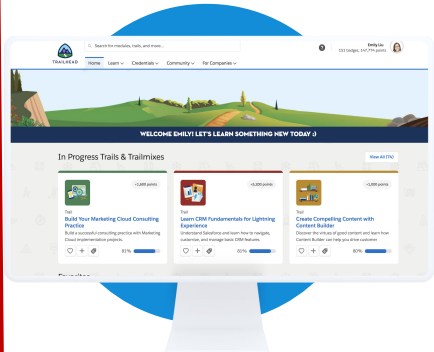
1T.org

# What Is Trailhead?

From free on-demand learning to custom-built content for your teams



## Trailhead Platform



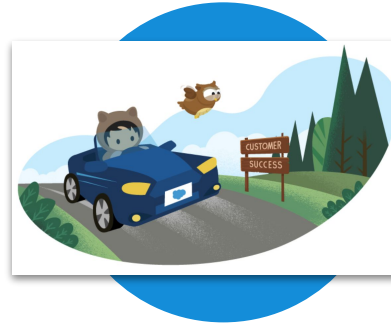
Grow your employees' careers and retain talent with free on-demand learning

## Trailhead Academy



Build expertise & validate skills across your organization with expert-led experiences

## Salesforce Enablement Services



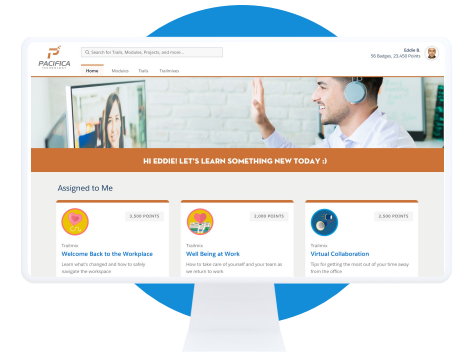
Drive your Salesforce adoption and increase productivity to meet your business goals

## Customer 360 Guides



Develop your digital strategy and expertise to fully realize your company's digital transformation

## myTrailhead

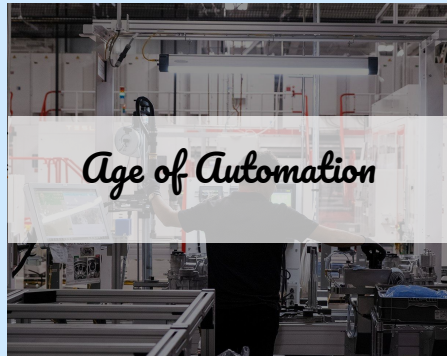
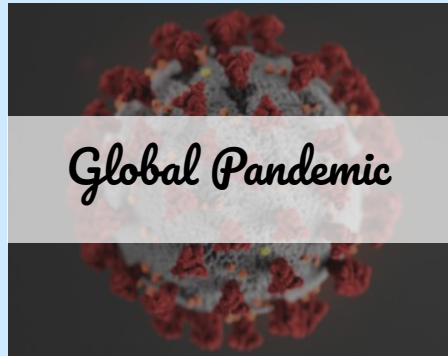


Enable sales and service teams within Salesforce to increase productivity with a digital adoption platform

# The Skilling Imperative to Digital Transformation

# Skilling Up Has Never Been More Important

Companies need to go digital fast



Digital  
Transformation  
strategy  
accelerated by  
**6 years**

# Companies Must Drive Success from Anywhere



Importance  
of Digital Apps

Shift to  
Digital Channels

Support for  
Digital Employees

Changing Business  
Model

# The Accelerated Digital Skills Gap

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## Challenges

Digital Skills Shortage  
Siloed Departments  
Distributed Workforces  
Disparate Systems  
Disengaged Teams  
Shifting Complexity

**Business Needs**

**Employees**

# Accelerate Digital Transformation with Education

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## Learn Skills Needed to Go Digital Fast

Learn the digital skills that your company needs to drive success from anywhere.

## Earn Role-Based Credentials

Earn skill-based badges and domain-based credentials to demonstrate your expertise.

## Connect to a Vibrant Community

Connect to a global community for expertise and guidance.

## Grow Your Company and Employees' Careers

Grow your business and teams across your organization.

3.5M  
Learners

35M  
Badges Earned



Gaurav Kheterpal  
CTO



# Must Drive Impact Across An Organization

Supercharge a company's learning

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Drive Product  
Adoption and  
Increase  
Productivity



Grow Your  
People's Careers  
and Retain Talent



Build Expertise  
Across Your  
Organization



Enable Teams  
with Learning in  
the Flow of Work



Develop Your  
Digital Strategy  
and Expertise

# Need To Consider Enabling Everyone Company-Wide



Build an agile digital organization with learning across multiple roles



**Business or Data Analyst**



**Salesforce Architect**



**Salesforce Consultant**



**Service Manager**



**Sales Manager**



**Salesforce Developer**



**Salesforce Administrator**



**Designer**



**Marketing Manager**



**End User**



# Learning Drives Productivity & Reskilling

Employees are reskilling at their companies

70%

have skilled up on  
technical and  
non-technical skills



2/3

more productive



# We Must Innovate To Be Flexible For Today's Learners

A big “And” statement of what to offer

**58%**

Of employees feel they aren't offered opportunities to grow skills

**On-Demand Learning**

**Hands-On Experiences**

**Social Learning**

**Expert-Led Training and Certification**

**Custom Learning for the Business**

**Highest Cert Exam Success Rate**

**Sync + ASync Guided Experiences**



# Learning Is A Critical Part of Customer Success

“Your goals, delivered”

- We align to your goals
- We build your path to success
- We track progress and results

# Importance of Learning Advocates Everywhere

# Learning Advocates For The Win

Invest in Creating Trailblazers for Lasting Success

We need to make it easy build one's career on our technologies.

We know cultural leaders in an organizations can be great influencers.

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## Meet the Trailblazers

Tap into an incredible source of inspiration to be your best.  
Dive into these stories of Trailblazers from all walks of life.

▶ WATCH THE VIDEO

/treyl-bley-zer/noun

- (1) a pioneer; an innovator; a lifelong learner; a mover and shaker.
- (2) a leader who leaves a path for others to follow.
- (3) most importantly, a person who builds a better world for others.



# Advocacy Starts At The Top

Spans Across the Customer Lifecycle

Leaders are making purchasing decisions to drive their digital strategy

They want to take advantage of all the innovation we are delivering in our solutions

They need a team who is always learning to support that innovation over time



Sim Tshabalala, Group CEO



# Standard Bank Turned to Trailhead to Skill Up All Employees to Succeed in Today's Digital World

Empower all 50K employees, including execs to learn Salesforce's tech and soft skills with Trailhead

Drive Standard Bank's vision to be a platform business that powers their relationship-driven business

Develop a culture of learning with gamification and a Leaderboard Dashboard highlighting employee Trailhead milestones



**30K+**  
active learners  
and growing

**20K +**  
Rangers

Multiple Private  
Training  
Workshops

Custom User  
Training



*"I have become a Ranger myself. Trailhead is by far the best learning environment I have ever encountered. I'm genuinely amazed by the incredible range and quality of Salesforce's capabilities."*

Sim Tshabalala, Group CEO

# Motivate Learners to Hit the Trails

Tactics for driving Learning advocacy

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Host a Learning Challenge

Launch a new initiative

Equality/Wellness/Sustainability

Create a Rewards Program

Lead from the top with an Executive Challenge

Make learning part of new hire onboarding

Build stronger leaders

Integrate learning into promotion criteria



Courtney,  
Sr. Product Analyst



Jared,  
Sr. Solution  
Consultant



Scott,  
AVP Sales



Claudia,  
Sr. Director, Marketing



# How Learning & Advocacy Align to the Customer Lifecycle

# Learning Embedded Through the Customer Lifecycle



# Learning is Critical Across the Customer Lifecycle



Stage in Lifecycle	Why It's Important
Pre-Sales	Prescriptive sessions to drive awareness of those involved in the selection process  Create shared 'vocabulary' for team
Hand Off Sales to Success	Create a culture of learning with the organization with key learning challenges & goals to set them up for success
Implementation	Building the technical expertise of the people closest to the project's success
Adopt	Make sure every end user is prepared and drive productivity
Renew	Ensure knowledge of new solutions & empower new team members to skill up quickly
Advocate	Providing the tools for on-going success & career growth



# We Know it Works & Drives Business Value

Continuous learning builds an agile and efficient workforce

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**30%**

faster time to  
value with  
continuous  
learning



**68%**

more efficient  
with continuous  
learning



**90%**

more productive  
with a  
Salesforce  
certification

Source: IDC, April 2021

# Let's Drive Advocacy Across the Customer Lifecycle

- Be the Advocate for the work your teams do
  - Focus on modern skilling solutions as an AND statement that provide options to meet learners where they are
- Create Advocates from practitioners to CEOs to build their careers on your solutions with learning at the center
- Instill a continuous learning culture and make sure your customers have what they need when they need it from pre-sales to go live to renewals
- Support and Reward Learning!



# Thank You



# QUESTIONS & DISCUSSION

# THANK YOU

Armoredhouse@salesforce.com



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# Learning Across the Customer Lifecycle



Stage in Lifecycle	What We Recommend	Why Its Important
<b>Pre-Sales</b>	<ul style="list-style-type: none"><li>• Trails &amp; Trailmixes, Trailhead LIVE on certain topics uncovered in discovery</li><li>• Expert-led Course Recommendation for Technical Practitioners</li></ul>	<p>Prescriptive sessions to drive awareness of those involved in the selection process</p> <p>Create shared 'vocabulary' for team</p>
<b>Hand Off Sales to Success</b>	<ul style="list-style-type: none"><li>• Product or Role Specific Trails</li><li>• Expert-led Courses for developing technical skills of practitioner teams</li></ul>	<p>Create a culture of learning with the organization with key learning challenges &amp; goals to set them up for success</p>
<b>Implementation</b>	<ul style="list-style-type: none"><li>• Expert-led Courses for developing technical skills of implementation teams</li></ul>	<p>Building the technical expertise of the people closest to the project's success</p>
<b>Adopt</b>	<ul style="list-style-type: none"><li>• Custom-End User learning solutions</li></ul>	<p>Make sure every end user is prepared and drive productivity</p>
<b>Renew</b>	<ul style="list-style-type: none"><li>• Product Specific Trails</li><li>• Expert-led Courses for developing technical skills of implementation teams</li></ul>	<p>Ensure knowledge of new solutions &amp; empower new team members to skill up quickly</p>
<b>Advocate</b>	<ul style="list-style-type: none"><li>• Role Specific Trails or Certifications</li></ul>	<p>Providing the tools for on-going success &amp; career growth</p>



Live sessions



Networking  
opportunities



Virtual Expo Hall



Join CEEdMA



Conference survey



THANK YOU  
TO OUR  
VENDORS

All PPT  
presentations  
will be  
converted to  
PDF's  
post-conferen  
ce.

# THANK YOU

Johndoe@XXX.com



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