



Expert Coaching Catalog

Updated February 2024





Success Plan Resources

These resources will help you start off strong, boost productivity, and focus on efficient growth. Fast track your success now.

Resource 1

Expert Coaching

Outcome-driven engagements to take your success to the next level

[Jump to Sessions](#)

Resource 2

Guided Onboarding

Expert led programs that outline best practices for setting up Salesforce products

[Learn More](#)

Resource 3

Office Hours

Highly interactive Q&A sessions with Salesforce experts for real-time answers and ideas

[Explore Now](#)

 **Pr**

Looking for a deep dive into Premier resources? [Register](#) for the Getting Started: Premier Success Plan webinar today!

[Learn how to succeed](#) with the right Salesforce Success Plan.



Resource 1

Expert Coaching





What's an Expert Coaching Session?

Take your success to the next level

Expert Coaching Sessions are specialized engagements designed to help you get more value from Salesforce products. We currently offer:

• Webinar Sessions



Engagements on a specific topic that are typically one hour. Select webinars have a video recording.

[Register for a Session](#)

▶ Videos

Recorded Expert Coaching Sessions that give you the flexibility to learn at your own pace and on your own schedule.

[Watch Video Sessions](#)

■ Individual Sessions



Personalized sessions with Salesforce experts to help you overcome obstacles and drive long-term success.

[How to Book](#)

Premier and Signature Success Plan customers can request an individual follow-up session after attending a webinar or viewing a video.



Available to Premier and Signature Success Plan customers.





Expert Coaching Topics

Choose a product or use case below.

Explore available sessions, and grow your skills with Salesforce experts.

| | | | | | |
|--|---|---|--|---|--|
|  Commerce |  CRM Analytics |  Data Cloud (formerly Customer Data Platform) |  Experience |  Heroku |  Industries |
|  Communications |  Consumer Goods |  Financial Services |  Healthcare & Life Sciences |  Manufacturing |  Public Sector |
|  Marketing |  Account Engagement (formerly Pardot) |  Engagement |  Intelligence |  Personalization |  MuleSoft |
|  Net Zero |  Platform |  Revenue |  Sales |  Salesforce Mobile |  Salesforce.org Education |
|  Salesforce.org Nonprofit |  Service |  Strategy & Planning | | | |

New Product Sessions

[Explore](#) Marketing Cloud Growth, Einstein GPT for Marketing, Revenue Lifecycle Management, Data Cloud Best Practices, and more!

More Ways to Learn

[Register](#) for the Getting Started: Premier Success Plan webinar
[View](#) additional session languages
[Explore](#) more resources

Getting Started

- Einstein Product Recommendations [B2C]
- Onsite Marketing & Promotions [B2C]
- Onsite Search [B2C]
- Sorting Rules [B2C]
- ▶ Composable Storefront [B2C]
- ▶ Manage the Product Lifecycle [B2C]
- ▶ Metrics and Analytics [B2B]
- ▶ Metrics and Analytics [B2C]
- ▶ Page Designer [B2C]
- ▶ Products and Catalogs [B2C]
- ▶ Salesforce Order Management
- ▶ Set Up Your Org on Lightning Experience [B2B]
- Search Engine Optimization (SEO) [B2C]

How To

- ▶ Change Management [B2B]
- ▶ Custom Reporting for Salesforce Order Management
- ▶ Einstein Complete the Set [B2C]
- ▶ Product and Catalog Setup [B2B]
- ▶ SEO for Public Sites [B2B]
- ▶ Technical Reports in Reports & Dashboards [B2C]
- Multi-Site Management Strategies [B2C]
- Promotions [B2B]
- Search & Sort [B2B]



New! Getting Started: Einstein GPT for Commerce

Learn how GPT can power your Commerce Cloud org [here](#).

Insights

- Feature Adoption Checklist [B2C]
- Improve Onsite Search Conversion [B2C]
- Personalize the Shopping Experience [B2C]

Review

- Composable Commerce Feature Review [B2C]
- Einstein [B2C]
- Improve Add to Basket Rate [B2C]
- Improve Cart Conversion [B2C]
- Onsite Search [B2C]
- Sorting Rules [B2C]

Getting Started

- CRM Analytics: Event Monitoring
- CRM Analytics: Platform Fundamentals
- Einstein Discovery
- Einstein Prediction Builder
- ▶ CRM Analytics: Financial Services Fast Start
- ▶ Revenue Insights: Fast Start
- ▶ Sales Analytics: Fast Start
- ▶ Service Analytics: Fast Start

How To

- CRM Analytics: Advanced Customizations
- CRM Analytics: Data Prep

Insights

- CRM Analytics: Visualize Your Data

Review

- CRM Analytics: Governance and Health Check



Data Cloud

Customer Data Platform is now Data Cloud



Getting Started

- Data Ingestion
- Data Mapping
- Overage Consumption Review
- Preparing for Mapping
- ▶ Prepare for Implementation
- Mapping Fundamentals

Experience



Getting Started

- Licenses and Profiles
- Self-Service Experience Foundations

How To

- SEO Best Practices
- Community Management
- Create a Public Knowledge Base
- Experience Builder Best Practices for PRM Portals
- Experience Builder Best Practices for Self-Service Sites
- Manage Sharing for External Site Users

Getting Started

- ▶ Enterprise Fast Start
- Onboarding & Implementation Strategy

How To

- Plan for Application Scaling
- Solution Proposal

Insights

- Application Performance Assessment
- Heroku Postgres Assessment
- Technical Discovery

Review

- Application Outage Review
- Operational Review

Getting Started

- Salesforce Industries for Communications, Media, Energy
- ▶ OmniStudio
- ▶ Set Up Salesforce Scheduler**

** Also appears in the Platform section.

How To

- Salesforce Scheduler: Best Practices

Insights

- ▶ Development Lifecycle Recommendations

Review

- Flow for Industries

Industries Communications



Getting Started

- Best Practices
- Onboarding and Implementation Strategy

Industries Consumer Goods



Getting Started

- ▶ Feature Overview

How To

- Best Practices



Industries Financial Services



Getting Started

- Financial Services
- Set Up Insurance with FSC
- ▶ Transition Assistant-Insurance Edition

How To

- ▶ Use Transition Assistant
- Best Practices



Industries Healthcare & Life Sciences



Getting Started

- Health Cloud for Payers and Providers
- Planning Your Implementation
- ▶ MedTech and Pharma Implementations

How To

- ▶ Referrals & Provider Relationship Management
- ▶ Use Transition Assistant With Health Cloud
- Best Practices

Industries Manufacturing



Getting Started

- ▶ Feature Overview

How To

- Best Practices



Industries Public Sector



How To

- ▶ Government Cloud: Plan Your Org Migration

Marketing Cloud Account Engagement



Pardot is now Account Engagement

Getting Started

- Account Engagement: New Admin Onboarding
- Account Engagement: Prepare for Implementation
- ▶ Account Engagement: Empower Your Sales Users
- ▶ Account Engagement: Personalization Through Automation
- ▶ Account Engagement: Use the Account Engagement Lightning App
- Account Engagement: Enhanced Builders in Lightning

Insights

- Account Engagement: Reporting Overview
- ▶ Account Engagement: Intro to B2B Marketing Analytics
- Account Engagement: Level Up Your B2B Marketing Analytics Reports and Dashboards



Guided Onboarding for Account Engagement

Learn more about this 3-week program [here](#).

How To

- Account Engagement: Einstein Feature Overview
- Account Engagement: Integrate with Google Ads and Analytics
- Account Engagement: Level Up Your Campaigns
- ▶ Account Engagement: Send List Emails
- ▶ Account Engagement: Use Automation Tools
- ▶ Account Engagement: Use Forms and Form Handlers
- ▶ Account Engagement: Use Landing Pages
- ▶ Account Engagement: Use Sales Emails and Alerts
- Account Engagement: Account Based Marketing Strategy
- Account Engagement: Email Marketing Strategy
- Account Engagement: Engagement Studio Foundations
- Account Engagement: Manage Leads

Review

- ▶ Account Engagement: Self-Guided Health Check
- Account Engagement: Database Hygiene Assessment
- Account Engagement: Expert-Guided Health Check
- Account Engagement: Level Up Your Engagement Studio
- Account Engagement: Salesforce Integration Technical Audit

Marketing Cloud Engagement



Getting Started

- Advertising: Segmenting and Activating Audiences
- Engagement: Build, Test, and Send Email
- Engagement: Deliverability Fundamentals
- Engagement: Email Personalization Basics
- Journey Builder: Journey Strategy
- ▶ Engagement: Administration and Setup
- ▶ Engagement: Data and Segmentation Basics
- ▶ Engagement: Distributed Marketing
- ▶ Mobile Studio
- Engagement: Design & Strategy for Email Marketing

Insights

- Engagement: Reporting and Tracking
- Engagement: Intelligence Reports for Engagement

How To

- Engagement: Einstein Feature Overview
- Engagement: Manage Your Data and Contacts
- Engagement: Use Marketing Cloud Connect
- Journey Builder: Set Up a Journey
- Engagement: Automate Data Imports
- Engagement: Automate Email Segmentation
- Engagement: Data and Contacts Feature Overview
- Journey Builder: Use Journey Builder

Review

- Engagement: Health Check



New! Getting Started: Einstein GPT for Marketing

Learn how GPT can power your Marketing Cloud org [here](#).

Marketing Cloud Intelligence



Getting Started

- Intelligence: Data Canvas Visualization
- Intelligence: Data Harmonization
- Intelligence: Data Model
- Intelligence: Data Upload & Mapping
- Intelligence: Plan your Implementation
- Intelligence: Platform Overview

How To

- Intelligence: Ready to Go Live
- Intelligence: Data Mapping
- Intelligence: Personalize Your Success

Review

- Intelligence: Admin Tips & Tricks
- Intelligence: Go Further



Marketing Cloud Personalization



Getting Started

- Personalization: Prepare for Implementation
- ▶ Personalization: Planning for Success

How To

- Personalization: Navigate the Platform
- Personalization: Prepare for Launch

Getting Started

- Anypoint Exchange Best Practices
- Center for Enablement
- Install and Connect MuleSoft Composer**
- Onboarding for Automation
- Onboarding to the Anypoint Platform
- Project Success on the Anypoint Platform
- Robotic Process Automation and the Anypoint Platform
- Anypoint Platform
- Composer
- GovCloud
- Go Further with RPA

** Also appears in the Platform section.

How To

- Automation Powered by Integration
- Best Practices for Business Groups
- Implement Automation Beyond the Basics

Getting Started

- Introduction to Net Zero Cloud

Getting Started

- Application Security
- Data Modeling 101
- Install and Connect MuleSoft Composer
- Introducing Hyperforce
- Lightning Configuration and Customization
- ▶ Einstein Next Best Action
- ▶ Flow Orchestration
- ▶ Set Up Salesforce Scheduler
- Automating with Salesforce Flow

How To

- Back Up, Manage, and Restore Salesforce Data
- Design and Integration Tools
- Salesforce Shield
- Transition to Salesforce Flow
- App Development with Salesforce DX
- Set Up Single Sign-On

Review

- Org Health
- Performance Assessment
- Salesforce Data Quality
- Security Maturity Assessment
- Web Accessibility Design



Guided Onboarding for the Salesforce Platform

Learn more about this 4-week program [here](#).

Getting Started

- Salesforce Billing
- Salesforce CPQ: Pricing
- Salesforce CPQ

How To

- Salesforce CPQ: Manage Renewals and Amendments
- Salesforce CPQ: Set Up Advanced Approvals
- ▶ Salesforce Billing: Generate an Invoice
- Salesforce CPQ: Build a Bundle
- Salesforce CPQ: Create a Product Catalog
- Salesforce CPQ: Guided Selling
- Salesforce CPQ: Use Price Rules
- Salesforce CPQ: Use Product Rules
- Salesforce CPQ: Use Quote Templates

Review

- Salesforce CPQ: Optimization Assessment

Sales (1 of 2)



Getting Started

- Admin Fast Start
- Campaign Management
- Considerations for Accounts and Contacts
- Einstein
- Email Templates
- Sales Engagement (High Velocity Sales)
- Sales Engagement Reporting (HVS)
- Set Up Einstein Activity Capture
- Set Up Sales Enablement
- Admin Basics

How To

- Get the Most out of Forecasting
- Managing Activities in Lightning
- Manage Leads
- Set Up and Keep Track of Opportunities
- Console Design
- Get the Most out of Enterprise Territory Management
- Prevent Duplicate Records
- Salesforce Maps: Layer Creation
- Set Up Gmail Integration
- Set Up Gmail Integration with Inbox
- Set Up Home Page
- Set Up Lead or Opportunity Workspace
- Set Up Outlook Integration
- Set Up Outlook Integration with Inbox
- Set Up Path in Lightning



New! Getting Started: Einstein GPT for Sales

Learn how GPT can power your Sales Cloud org [here](#).

Sales (2 of 2)



Insights

- Design Reports and Dashboards
- Enterprise Territory Management & Territory Planning
- Level Up Your Reports and Dashboards
- Opportunity Management for Products and Price Books

Review

- Health Check



Guided Onboarding for Sales Cloud

Learn more about this 4-week program [here](#).

Salesforce Mobile



Getting Started

- ▶ Platform Fast Start

How To

- Improve Adoption

Getting Started

- ▶ Education Data Architecture (EDA)
- ▶ Using Student Success Hub
- Best Practices for Working with a Partner

Getting Started

- Essential Admin Skills for Nonprofits
- Nonprofit Success Pack for Fundraising
- ▶ Best Practices in Online Fundraising with Elevate
- ▶ Contact & Household Management in NPSP
- Best Practices for Working with a Partner
- Case Management for Human Services
- Contact & Household Management in NPSP
- Nonprofit Cloud for Program Management

How To

- Set Up Campaigns for Nonprofit Fundraising
- ▶ Set Up Levels and Engagement Plans in NPSP
- ▶ Track Soft Credits in Nonprofit Success Pack
- Automating with Salesforce Flow for Nonprofits
- Get Your Data into Nonprofit Success Pack (NPSP)
- Manage Activities in Nonprofit Success Pack (NPSP)
- Prevent Duplicates in Nonprofit Success Pack (NPSP)
- Use Email Functionality to Engage Nonprofit Stakeholders

Insights

- Reports and Dashboards in Nonprofit Success Pack (NPSP)
- Advanced Reports & Dashboards in NPSP

Review

- Org Health for Nonprofits

♥ Service (1 of 2)



Getting Started

- Agent Productivity Features
- Digital Engagement
- Einstein Bots
- KCS in Lightning
- Messaging for Web and In-App
- Service Cloud Einstein
- Slack for Service
- Voice
- ▶ Omni-Channel
- Field Service: Dispatcher Console
- Field Service: Field Service Mobile
- Field Service: Modeling Work
- Field Service: Scheduling
- Field Service: Territory and Resource Management
- Lightning

How To

- Automate Your Case Management
- Design Your Lightning Console
- Einstein Bots NLP Tuning
- Field Service: Schedule Optimization
- Import External Content in Lightning Knowledge
- Plan Salesforce Knowledge in Lightning
- Set Up Entitlements & Milestones
- ▶ Plan Your Lightning Knowledge Transition
- Automate Work Distribution With Omni-Channel
- Deploy Chat



New! Getting Started: Einstein GPT for Service

Learn how GPT can power your Service Cloud org [here](#).

♥ Service (2 of 2)

Insights

- Dashboard Design



Guided Onboarding for Service Cloud

Learn more about this 5-week program [here](#).

Strategy & Planning



Getting Started

- Change Management
- Governance Framework
- Vision and Strategy

How To

- Approaches to a Center of Excellence
- Manage the Salesforce Development Lifecycle
- ▶ Org Migration Best Practices

Insights

- Single vs. Multi-Org Implementation Planning

Review

- Salesforce Maturity Assessment
- Improve Salesforce Adoption



Additional Session Languages

We support some Expert Coaching Sessions in additional languages. Explore the French, German, Italian, Japanese, Portuguese, and Spanish catalogs below.

[French](#)[German](#)[Italian](#)[Japanese](#)[Portuguese](#)[Spanish](#)

Resource 2

Guided Onboarding



Guided Onboarding for Sales Cloud

Get expert guidance on starting your Sales Cloud journey.

A 4-week guided onboarding program for Sales Cloud admins.

Led by a Salesforce expert who will share how to successfully prepare for, configure, and launch Sales Cloud.

Learn the hands-on skills you need to be successful with Sales Cloud and the resources you can lean on after your implementation. Available to Premier and Signature Success Plan customers.

[Register Now](#)

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Week 1

Kickoff: Prepare for Success



Week 2

Plan Your Implementation



Week 3

Create the User Experience



Week 4

Deploy and Empower Users

Guided Onboarding for Service Cloud

Get expert guidance on starting your Service Cloud journey.

A 5-week guided onboarding program for Service Cloud admins.

Led by a Salesforce expert who will share how to successfully prepare for, configure, and launch Service Cloud.

Learn the hands-on skills you need to be successful with Service Cloud and the resources you can lean on after your implementation. Available to Premier and Signature Success Plan customers.

[Register Now](#)

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Week 1

Kickoff: Set Yourself Up for Success



Week 2

Set Up and Manage Cases



Week 3

Boost Agent Productivity



Week 4

Service Reporting



Week 5

Self Service

Guided Onboarding for the Salesforce Platform

Get expert guidance on starting your Salesforce Platform journey.

A 4-week guided onboarding program for Salesforce Platform admins.

Led by a Salesforce expert who will share how to successfully prepare for, configure, and launch the Salesforce Platform.

Learn the hands-on skills you need to be successful with Salesforce and the resources you can lean on after your implementation. Available to Premier and Signature Success Plan customers.

[Register Now](#)



Week 1

Kickoff: Set Yourself Up for Success



Week 2

Lightning Configuration and Customization



Week 3

Application Security



Week 4

Automation and Access Management

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Pr Guided Onboarding for Account Engagement

Get expert guidance on starting your Account Engagement journey.

A 3-week guided onboarding program for Account Engagement admins and power users.

Led by a Salesforce expert who will share how to successfully prepare, configure, and run Account Engagement.

Learn the hands-on skills you need to be successful with Account Engagement and the resources you can lean on after your implementation. Available to Account Engagement Premier and Signature Success Plan customers.

[Register Now](#)

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Week 1

Kickoff: Set Yourself Up for Success



Week 2

Assets and Automations



Week 3

Analytics and Alignment

Resource 3

Office Hours (Ask an Expert)





Pr Office Hours (Ask an Expert)

Talk with Salesforce experts and learn from your peers. Join us as we answer adoption, best-practice, and how-to questions live! Available to Premier and Signature Success Plan customers.

Discuss the following topics and more:

- Sales Cloud
- Service Cloud
- Marketing Cloud
- Marketing Cloud Account Engagement (formerly Pardot)
- CRM Analytics

Find more discussion topics and register for a session today!

[Register Now](#)



Explore More Resources

Join the Trailblazer Community

Ask questions, get answers, explore ideas, and be inspired by Salesforce experts and customers like you.

[Join Now](#)

Visit the Help Center

Need help? Log cases, find documentation, and more – all the support you need, wherever you need it.

[Log In](#)



Thank You

