



# Expert Coaching Catalog

Updated April 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.

**Pr** 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	Tableau		

### 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]

# CRM Analytics



## 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

# Industries



## 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
- CloudHub 2.0
- 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
- Security Overview and Best Practices
- Tools and Technologies

## Insights

- Migration Strategies
- The MUnit Framework

## 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

# Salesforce.org Education



## 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

### Get Started

- Tableau Bridge
- Tableau Cloud
- ▶ Drive Adoption within Your User Base
- ▶ Realize Value from Your Data
- Data Management Add-on
- Tableau Blueprint and Tableau Blueprint Assessment
- Tableau Pulse

### Implement

- Dashboard Performance Best Practices
- Onboard New Users at Scale
- ▶ Build an Education Program
- ▶ Create Tableau Community
- ▶ Prepare for Tableau Server Implementation
- ▶ Self-Migrate from On-Premise to Cloud

### Use & Optimize

- ▶ Analytics Best Practices
- ▶ Assemble a Strong Analytics Project Team
- ▶ Deploy Tableau Desktop and Tableau Prep at Scale
- ▶ Implement a Self Service Analytics Framework
- ▶ Implement Change Management/Increase Your User Base

# 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



# Pr 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](#)

salesforce



## Week 1

Kickoff: Prepare for Success



## Week 2

Plan Your Implementation



## Week 3

Create the User Experience



## Week 4

Deploy and Empower Users

# Pr 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

# Pr 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](#)

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## Week 1

Kickoff: Set Yourself Up for Success



## Week 2

Lightning Configuration and Customization



## Week 3

Application Security



## Week 4

Automation and Access Management



# 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](#)



## 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)





## 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

