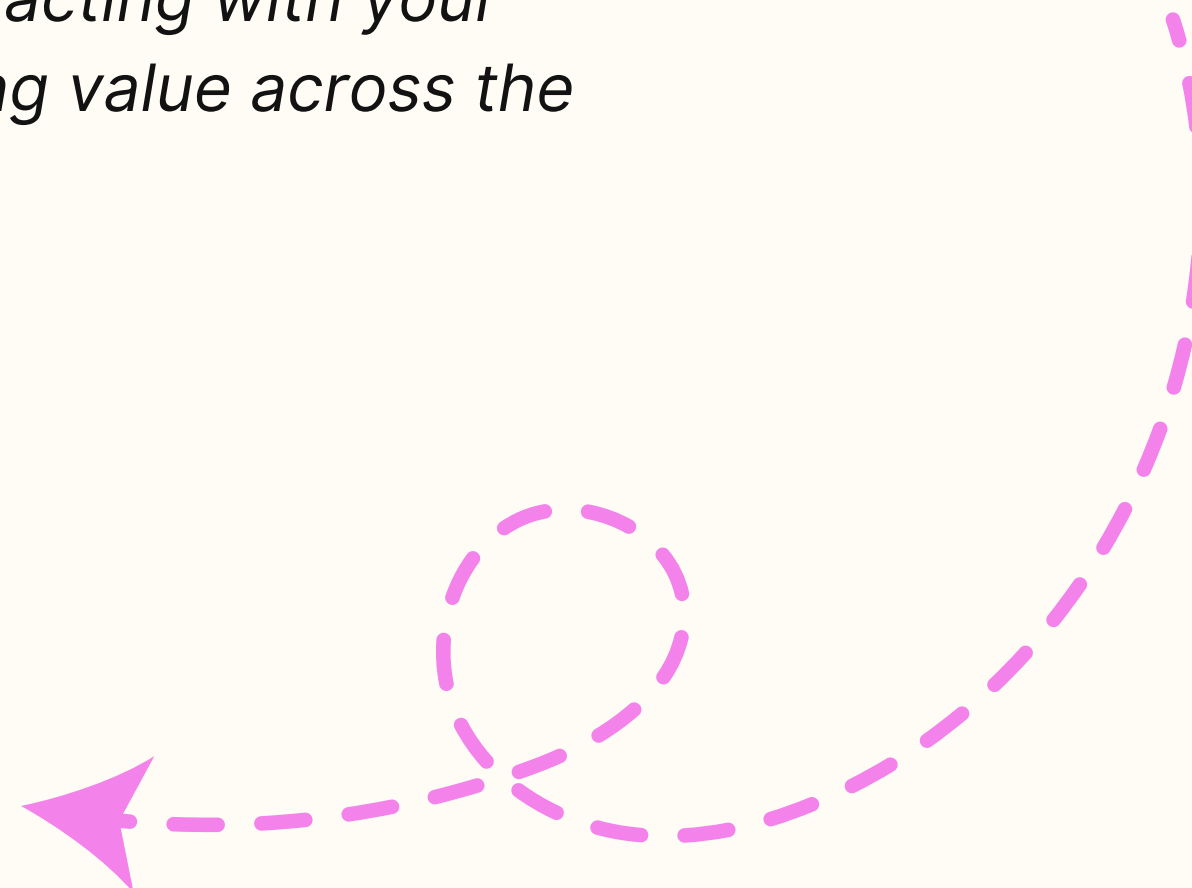


Skilljar and Salesforce are **Better Together**

Enable your teams to see how learners are interacting with your Academy to drive success and recognize training value across the entire customer journey.



Why Integrate?

- 1 Real-Time Data Sync:** Provides broad visibility to training data by sending it to Salesforce in near real-time.
- 2 Certified Managed Package:** Quick and easy installation via the Salesforce AppExchange, with frequent updates that provide you the most complete data set in the market.
- 3 Comprehensive Data Linking:** Connects your student records to contact-level data for detailed account level roll-ups.
- 4 Expert Support & Documentation:** Access thorough, regularly updated documentation and expert post-sales support.

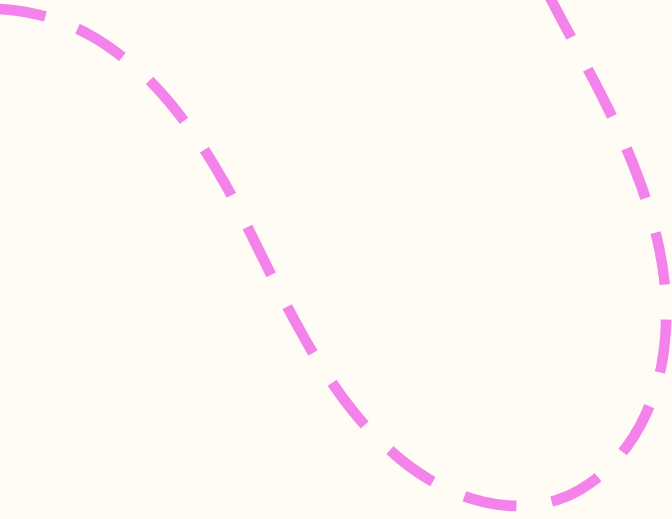
CRM + LMS Benefits

Reach stakeholders across your business

View and analyze training data for business impact

Generate leads and improve campaign targeting

Spot risk earlier and faster



In response to the importance of tying Learning Management System activities to business outcomes:



It's crucial. If I didn't have CRM data, I wouldn't run a customer education program. I have to have my data from my LMS and my data from my CRM, and without those two things I wouldn't even consider taking on the role of a customer education leader... (without that information) you can never do your job and show what you need to do, so for me that is truly crucial.



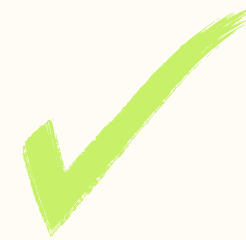
Debbie Smith

President, Customer Education Management Association (CEdMA)

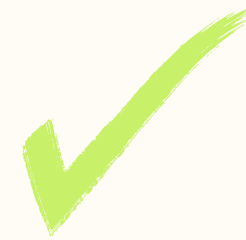
Senior Director of Visier University, Visier Inc.

Integration Checklist

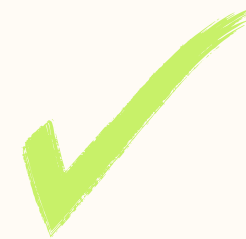
Determine if you would like to send data to your sandbox instance before linking to your production instance, then follow this simple checklist:



Choose Domains: Select the Skilljar training domains you wish to pass training data from. This allows you to exclude unwanted testing or internal data from your Salesforce instance.



Data Linking Strategy: Decide whether to link Skilljar data to Salesforce contacts directly or post-transmission. Direct linking pairs student data with the correct contact automatically.



High Volume Object Option: Enable if needed for tracking specific lesson-related work, but recommended to leave off until necessary for reporting.



Historical Data Import: Backfill existing and historic Skilljar training data easily after enabling the Salesforce integration. [Learn more here.](#)



Internal Coordination: Identify other departments that would benefit from training analytics including Customer Success, Sales, and Support and consult them on their specific needs.

Salesforce Admin: How-To Guide

Preparation

Download the Application:

- Go to the [Salesforce AppExchange](#)
- Download the appropriate managed package
- Choose “Get it now” and login to your Salesforce account



Our recommendation is to install the package in your Salesforce Sandbox environment first, then Production.

Installation

Pre-Installation Configuration: Visit [dashboard.skilljar.com/salesforce](#) and ensure your Skilljar account is configured to complete authentication

Domain & Authentication Settings:

- Select and expand “Domain and Authentication Settings”
- Choose domains for passing training data to Salesforce or leave blank to use all domains
- If connecting to a Salesforce Sandbox, select “Sandbox”
- Decide if you want to automatically link contacts (see Data Linking Strategy on Integration Checklist)
- *Optional:* Select “Include High Volume Custom Objects” for high-volume API custom objects

Authentication

Select “Save and Authenticate with Salesforce”



We recommend you create a designated Salesforce integration user for authentication to avoid data interruptions.

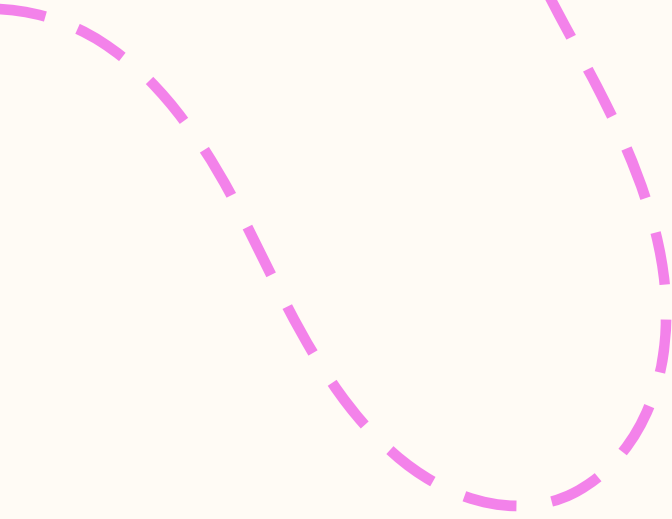
Confirmation

Successful Authorization: Confirmation message will appear if the integration was success and data will start sending to Salesforce.

Re-Authentication

Upgrade Process:

- Download the latest version of the Salesforce application
- Visit [dashboard.skilljar.com/salesforce](#)
- Select “Save and Authenticate with Salesforce”
- Ensure the appropriate permissions for re-authentication



Hear from a Salesforce administrator who
successfully leveraged the integration:



Skilljar's Salesforce integration was straightforward and easy to set up. The integration has enhanced our training program by providing valuable insights into learner progress and engagement. Specifically, I found it very useful to create custom dashboards with training data, such as comparing completed courses to renewal dates to inform our internal teams."



Rasmus Raarup

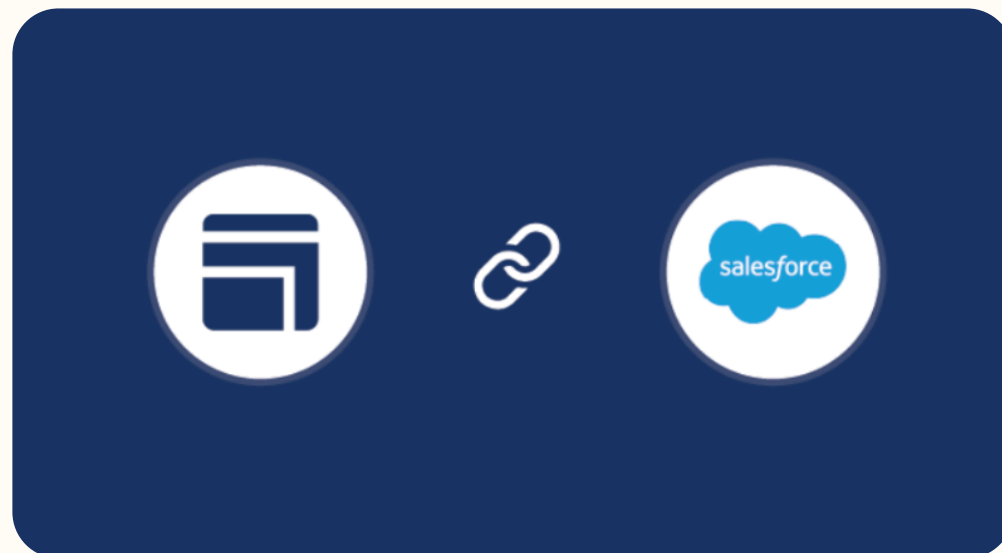
Revenue Systems Specialist, *Templafy*

Skilljar's Recommended Approach

Phase 1

Integration Set-Up & Student Contact Linking


- Automatically link new Student objects to existing Contact objects using the email field, with customizable logic to handle cases where no matching Contact is found.
- Connect training data to your business metrics, forming the basis for comprehensive reports and dashboards.

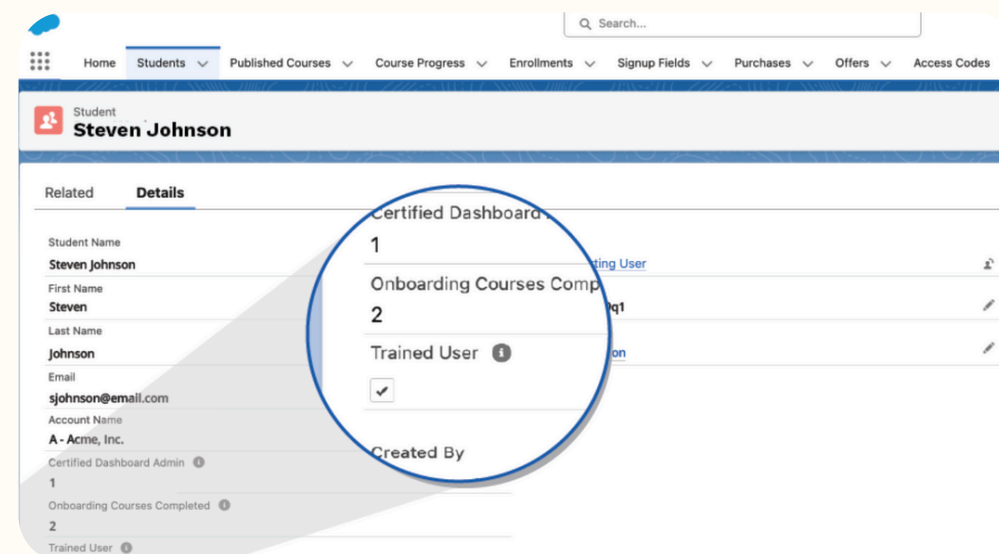


Phase 2

Define Trained Users

- Define what makes a "trained" user and create a custom field on contact records to identify them. Pass enrollment and completion data to Salesforce to set rules, generate custom reports, and compare users.


 We define a trained user as someone who has either registered for all onboarding courses or passed the Skilljar Admin Professional Exam. Consider key content or certificates that align with your training goals.

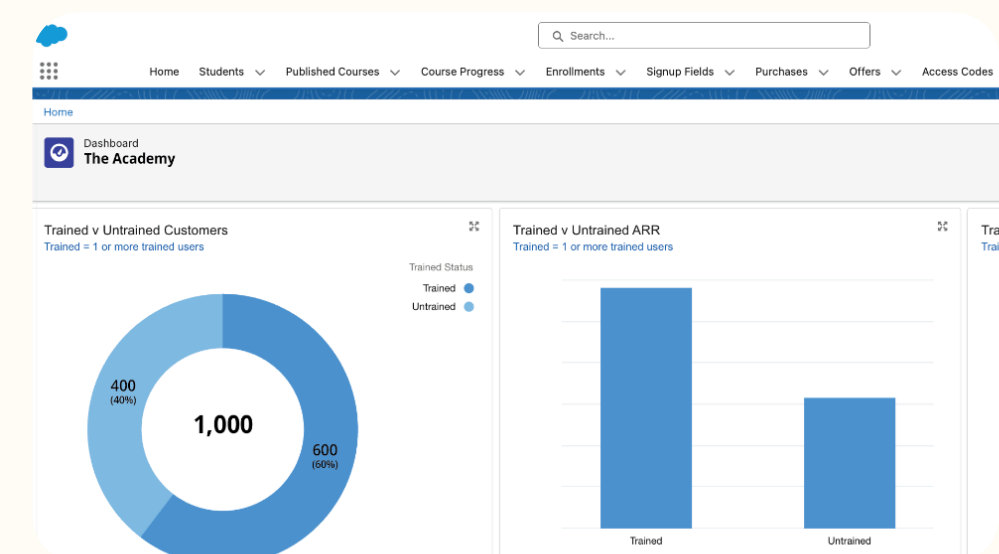


Phase 3

Report on Business Impact

- Differentiating trained vs. untrained accounts alongside key business metrics allows you to demonstrate the overall impact of your training program on your organization.

 We recommend you start with these views: # of Accounts Trained vs. Untrained, ARR/GRR, Renewal Rate, CSAT/NPS, and Customer Health Score.



The Power of Learning Data with



&



Customer Success & Implementation

- **Comprehensive Health Signal:** Include training data in health scores for a more accurate customer health picture.
- **Training Completion Alerts:** Notify CSMs of incomplete training, enabling proactive interventions.
- **Implementation Team Visibility:** Use dashboards to highlight accounts with incomplete prerequisite training, speeding up onboarding.
- **Account Level Tracking:** Add training progression metrics to account dashboards for better team context.

Go to Market Teams

- **Seamless Lead Creation:** Automatically convert new Academy registrants not in Salesforce to a lead.
- **Highlight Expansion Opportunities:** Alert Sales when a prospect or customer has enrolled in training on a new product.
- **Precise Campaign Targeting:** Target campaigns in your Marketing Automation tool based on learning activity like registration, completion, and drop-off.
- **Promote Training at Right Time:** Recommend new training content to prospects or customers based on course registration and completion history.

Send data from Salesforce to common tools that also handle these workflows



Send data from Salesforce to common tools that also handle these workflows



The Power of Learning Data with &

Customer Education & Executive Team

- **Best Outcomes for Trained Accounts:** Build reports to show training consumption impact on important account-based business metrics such as retention, NPS, expansion, ticket volume, and product adoption.
- **Reduced Support Tickets:** Arm support agents with customer training history to speed-up ticket resolution with course recommendations.

Send data from Salesforce to common tools that also handle these workflows



E-commerce / Monetization

- **Monetization Administration:** All within Salesforce, add training seats to new contracts, grant access to training, and track training consumption and progress for clear revenue recognition.

Send data from Salesforce to common tools that also handle these workflows





Ready to get started with Salesforce?

[Download the Salesforce App](#)

Additional Resources:
[Skilljar Academy Course](#)
[Skilljar Help Center](#)