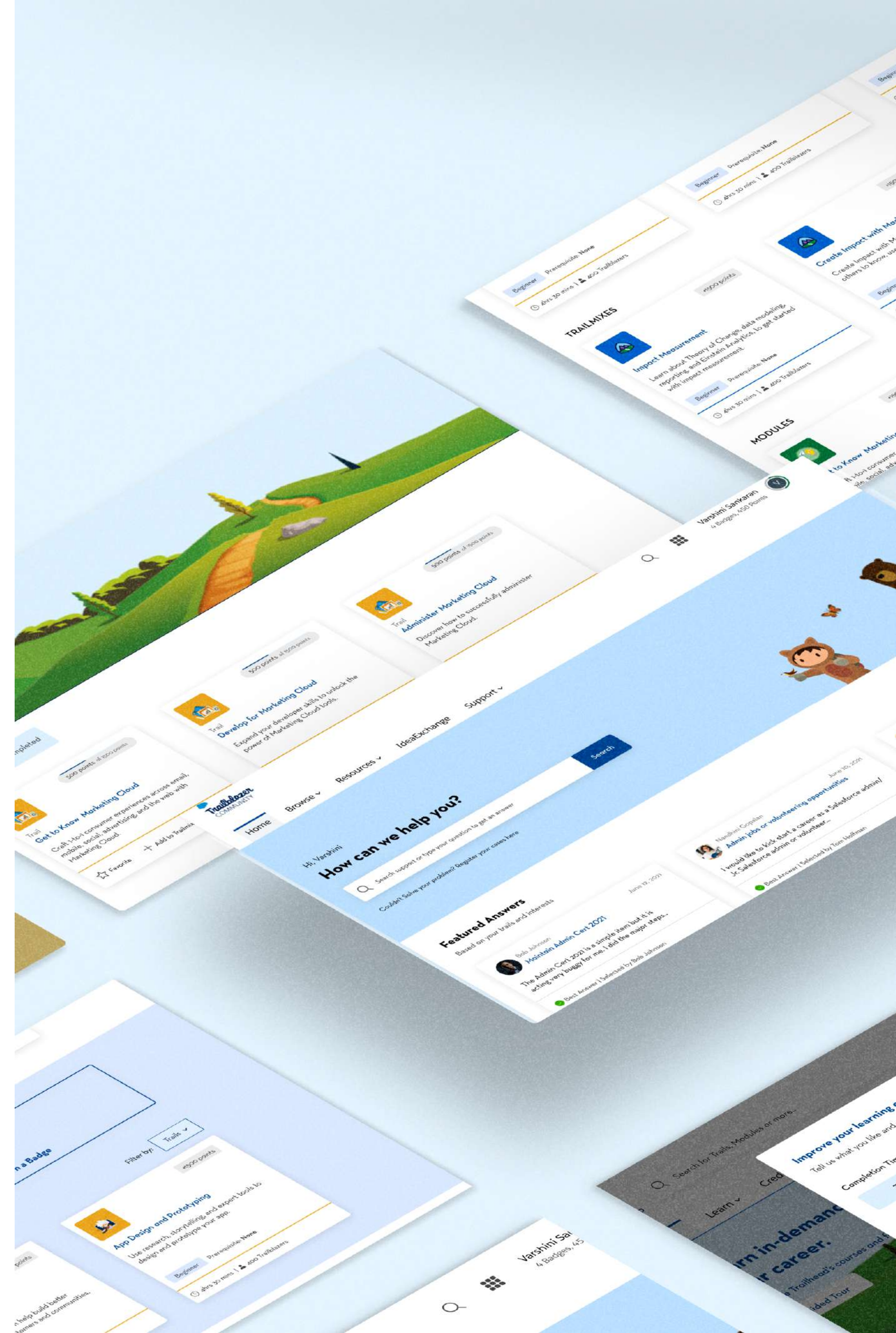Salesforce Externship

Trailblazer Redesign

Redesigning Trailblazer Community and
Trailhead Onboarding experience for

Duration: 6 weeks (Research + Design)

The prompt

" Suggest news ways to enable customers on Trailhead that impact their knowledge from the platform. "

Pretty broad right?

What is Trailhead?

A revolution in online learning

Trailhead is an online learning platform with free, self-paced, bite-sized content that gives everyone the tools to learn the technologies and skills necessary to land a great job in today's workforce,

How does Trailhead help users?

More than 50% of Trailhead learners reported they had gained skills that resulted in a **promotion or a raise** at their current company.

One in five reported a salary increase of more than 20% because of Trailhead.

one in three Trailblazers have found a new job with the skills they've learned on Trailhead.

Source

So, how did I approach?

I wanted to narrow down the problem space and also understand where the gap exactly is in the customer's learning.

1 Trailhead modules

2 Trailblazer community

Why, Trailblazer community?

The Salesforce ecosystem will **create 9.3 million new jobs and 1.6 trillion** in new business revenues worldwide by 2026. This growth is powered by **Trailblazers.**

IDC Report

1 ~~Trailhead modules~~

2 Trailblazer community

Some interesting facts – Trailblazer community

15M+
people help each other
learn new skill

1300+
interest groups that share
guidance and expertise

3 in 5
credit the community
for new job

IDC Report

Values – Trailblazer community

45%

members said learning from
the community helped them
deliver more value

3 out of 4

found a mentor or mentee
through the community

Valoir

How does improving Trailblazer **impact knowledge?**

Trailblazer community forum

→

More than half of learners say they **turn to peers first for help and knowledge.**

80% say community engagement has helped them **deliver success**

The **Trailblazer Community is a game-changer** for Trailblazers.

→

User experience and engagement

Ways of gaining knowledge

Now, what do I want to focus on?

1 Community experience connected to your Trailhead learning

2 Posting questions and answers

3 Search bar experience

4 Challenges in gaining knowledge

5 The context of the Trailblazer community

Wait, what does the users think?

- User research
- Heurisitic Evaluation

I spoke to 6 users with varying backgrounds to understand their experience with the platform.

First, getting **familiar with Trailblazer**

Heuristic Evaluation
Semi–Structured Interviews

- - → Research Insights - - → Themes Identified

Usability & User Experience

	1 Basic	2 Medium Priority	3 High Priority
A Quick Fix	A1 06	A2 02	A3 02
B System Changes	B1 03	B2 01	B3 02
C Process Changes	C1 02	C2 01	C3 00

Business & Technical Feasibility

19 Problem Statements

25 Heuristic Violations
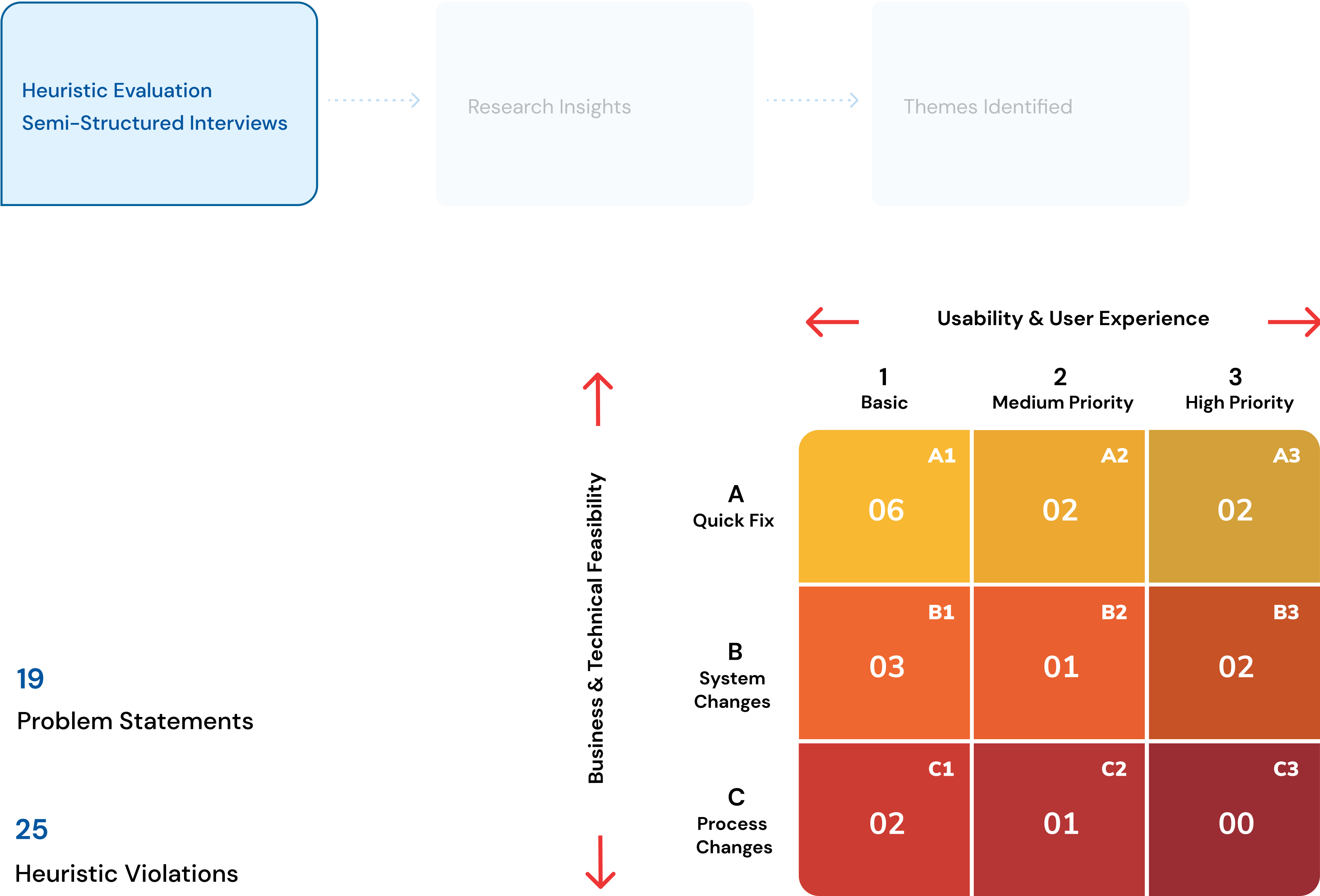
So, what were the challenges **faced by users?**

Heuristic Evaluation
Semi-Structured Interviews

Research Insights

Themes Identified

Inefficient Search Engine

"The search bar doesn't help me to find the answer or an article".

Overwhelming Navigation

"Too many tabs and redunant options present".

Irrelevant filters

" I need helpful filters to find content in the platform".

Content Hierarchy

" I tend to overlook many content as it is not helping in accomplishing my goal".

Unpersonalized learning curve

" Learning pattern could be improvised".

The key design opportunities started to araise.

Through synthesis of all the data gathered, I realized that the new and expert users essentially face similar problems but overlapping one another.

How might we?

Heuristic Evaluation Semi-Structured Interviews	⟶	Research Insights	⟶	Themes Identified
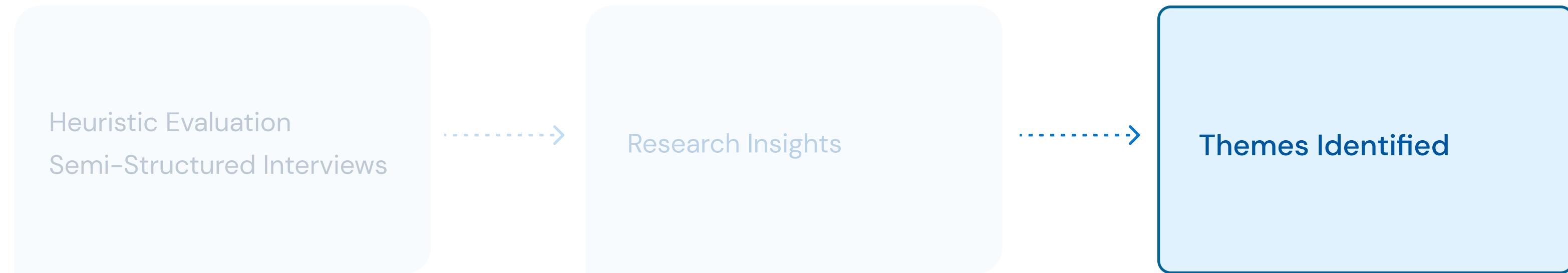
–help the user to **navigate easily** to find the content?

–**encourage** the users to use trailblazer search more than google search?

–**guide** the user to find the answers in few steps?

–**suggest modules** that the user is looking for?

–**improve** the search engine efficiency?

–**reduce the recall** effort for the user?

Are you thinking what I'm thinking?

While there is a plethora of content on Trailhead and Trailblazer community, users are struggling to get their questions cleared due to the problems at product core level. The platform faces problems in **user exposure, and engagement.**

→ Help users find and engage with communities.

→ Enhance the search bar experience.

→ Personalized engagment.

Trailblazer Community Redesign

Home Page | Answers Page | Articles Page | Navigation
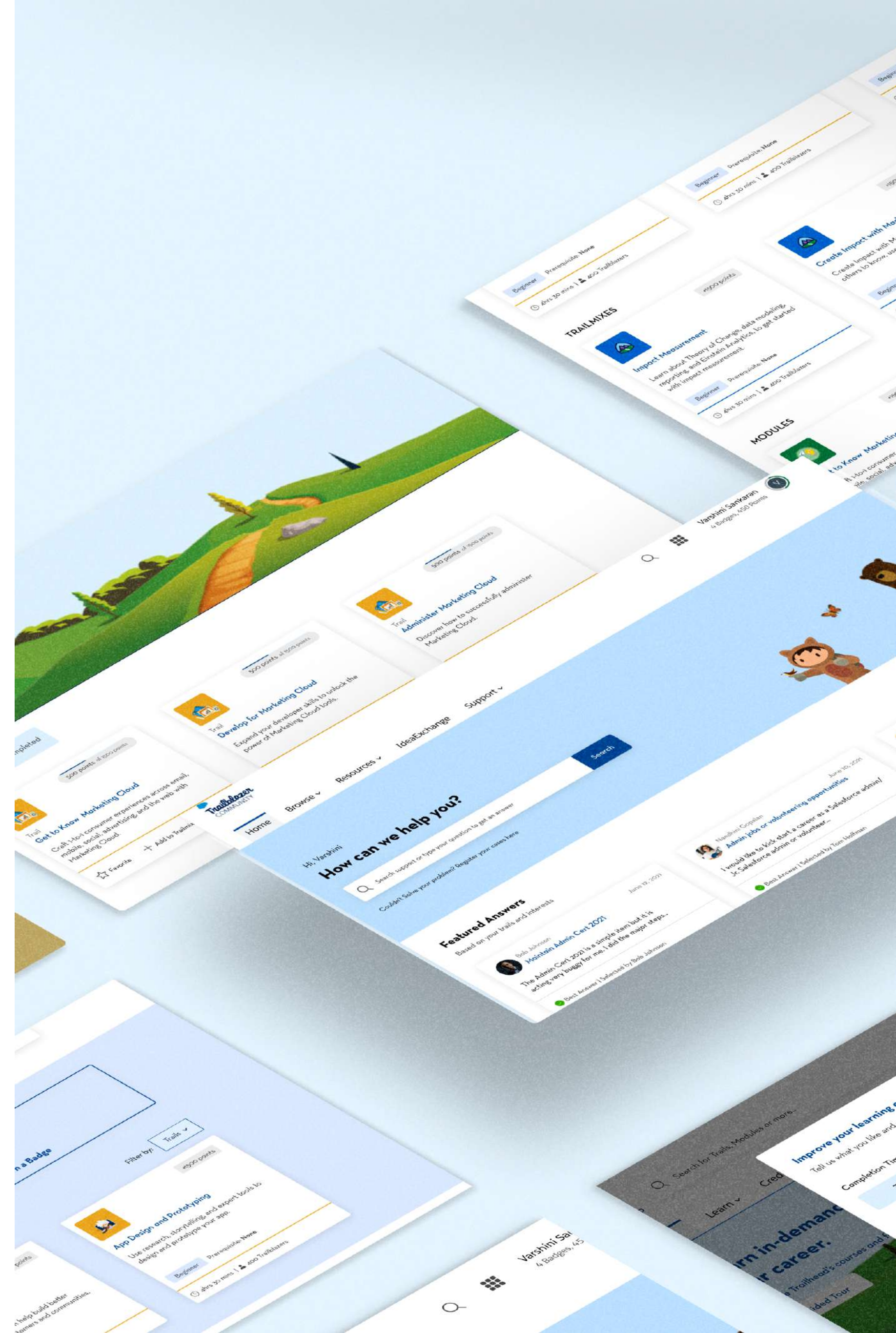
Trailblazer Homepage
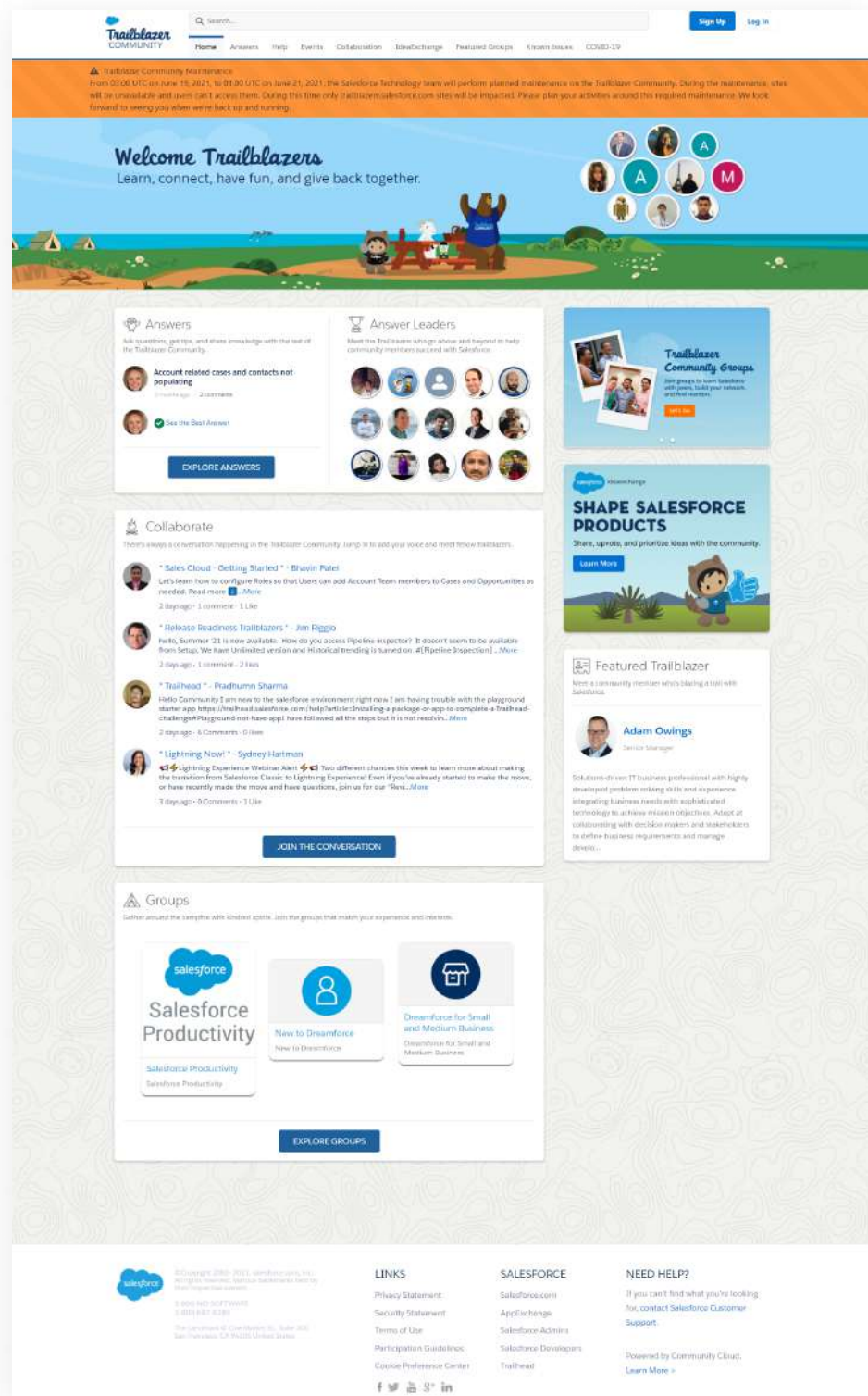
After →
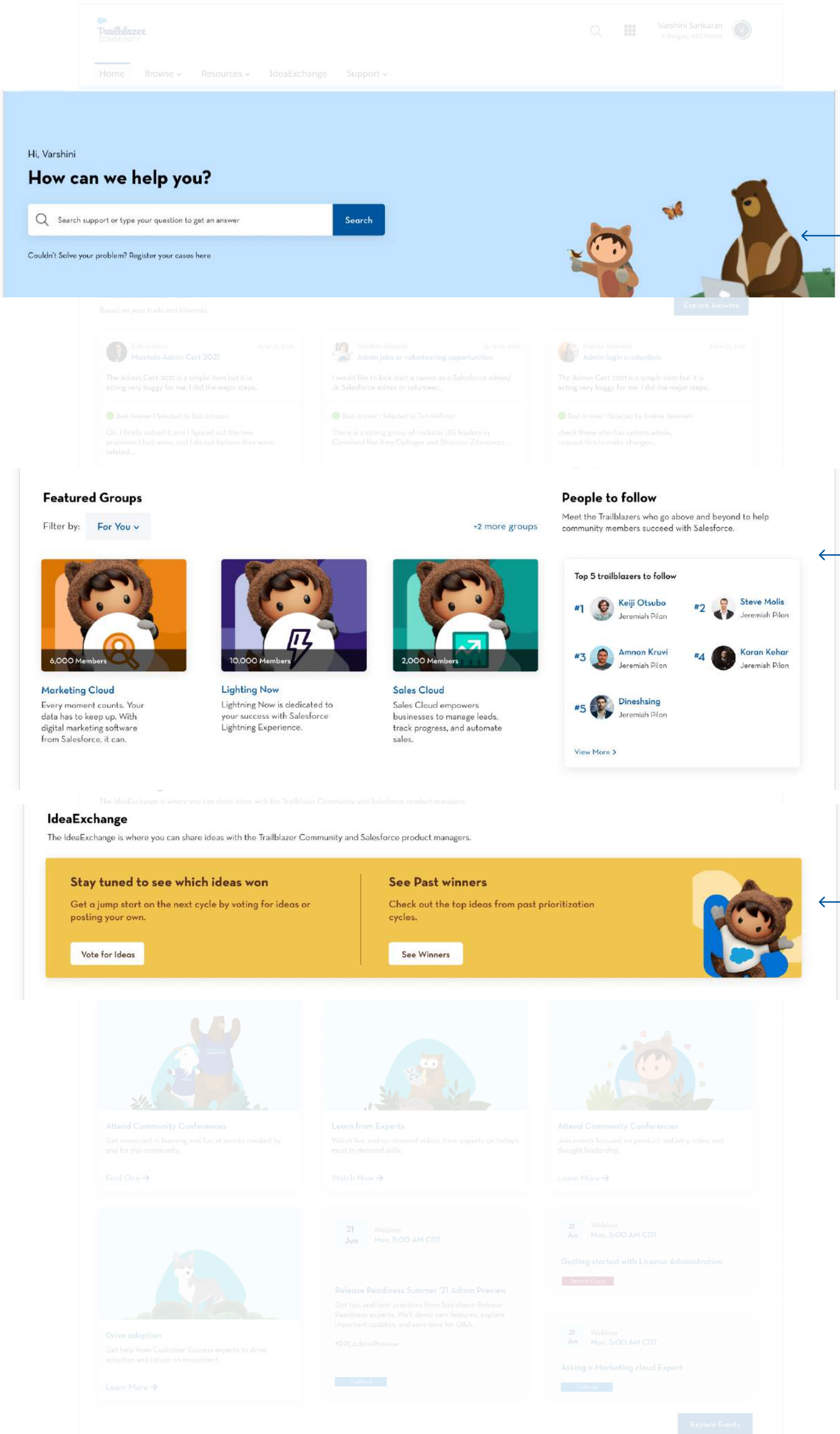
Dedicated Search Bar

User Guidance

Nudge User

Trailblazer Navigation
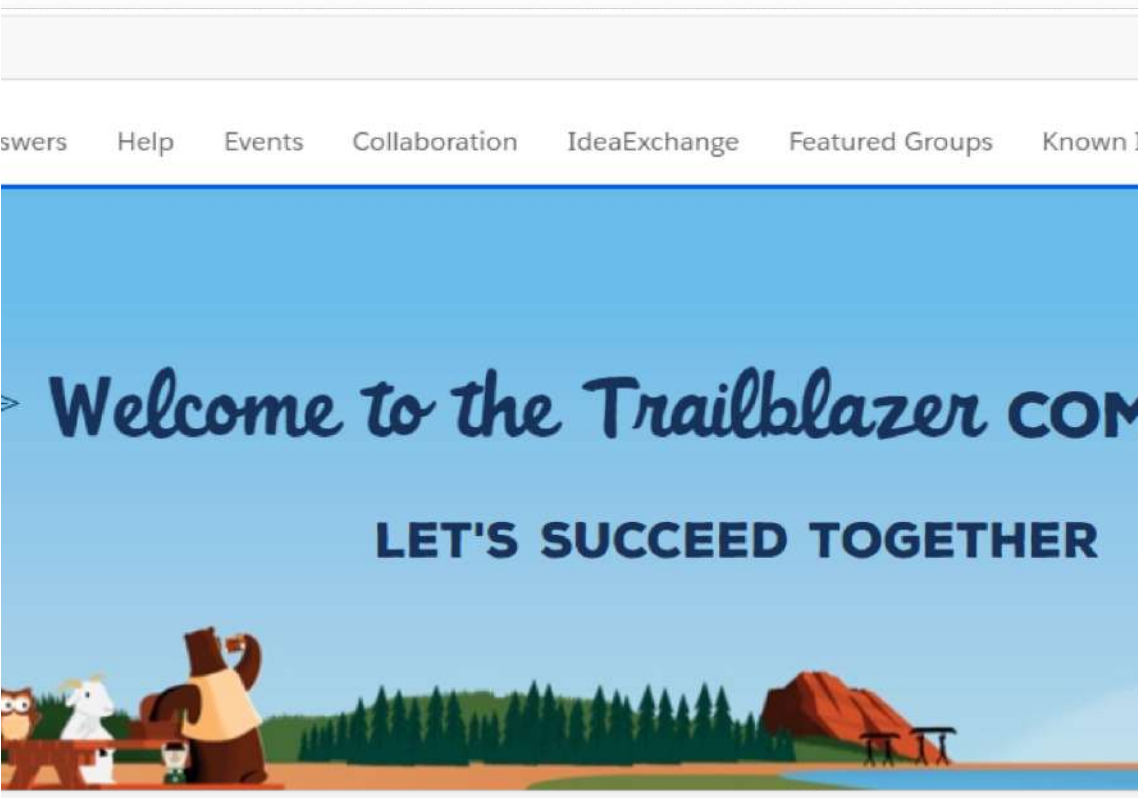
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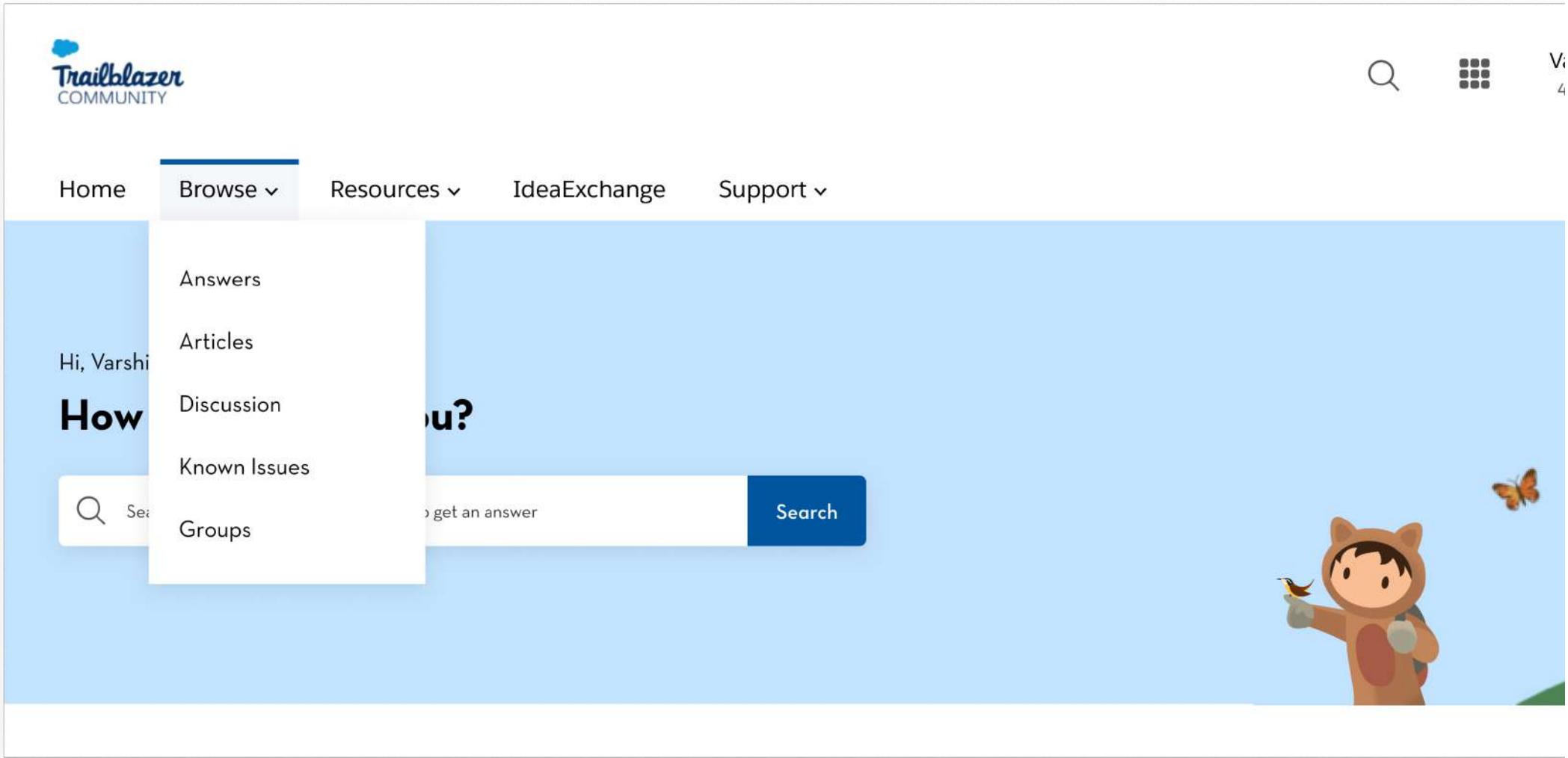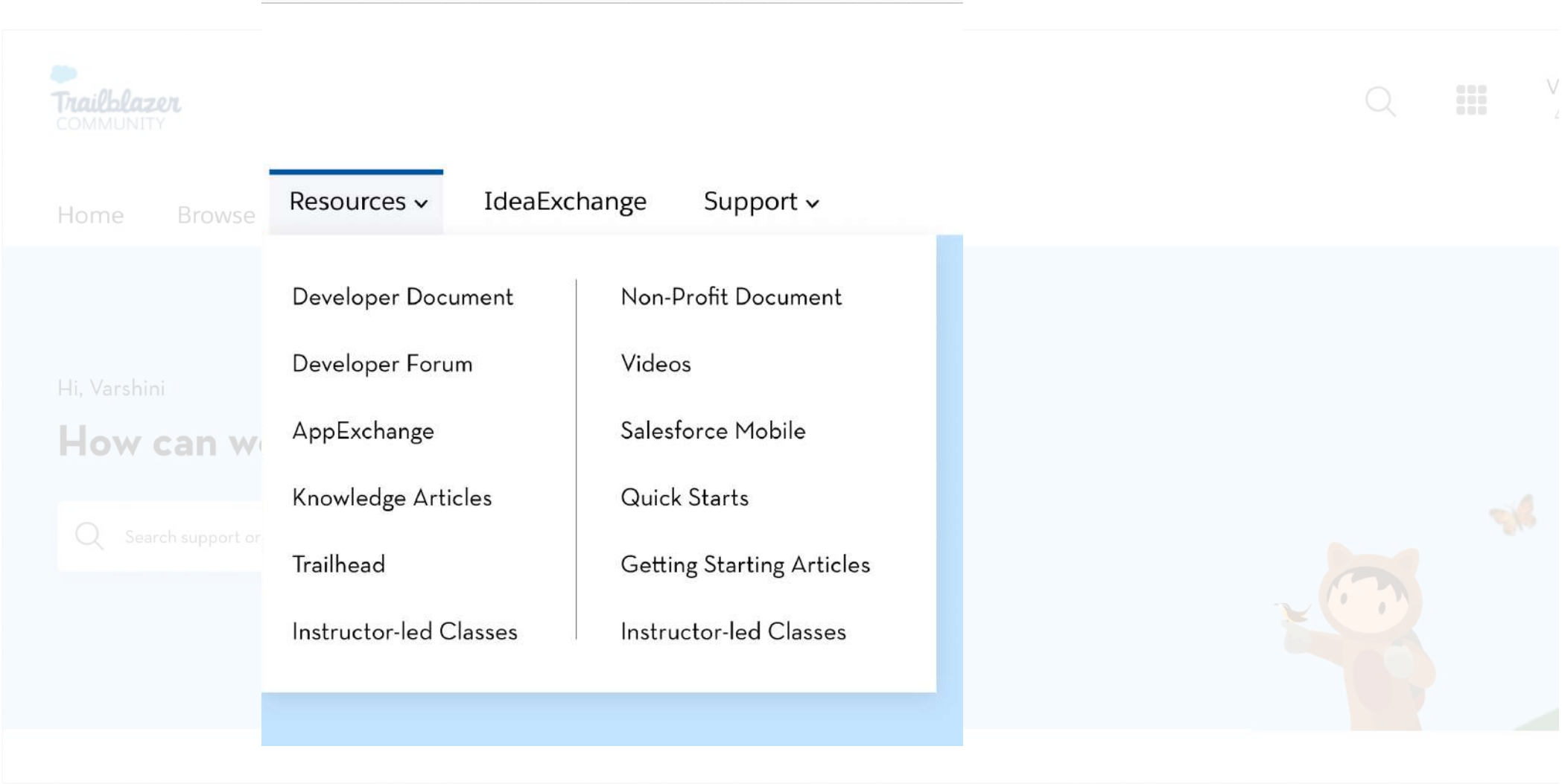
Trailblazer Answers Page

After

User Support
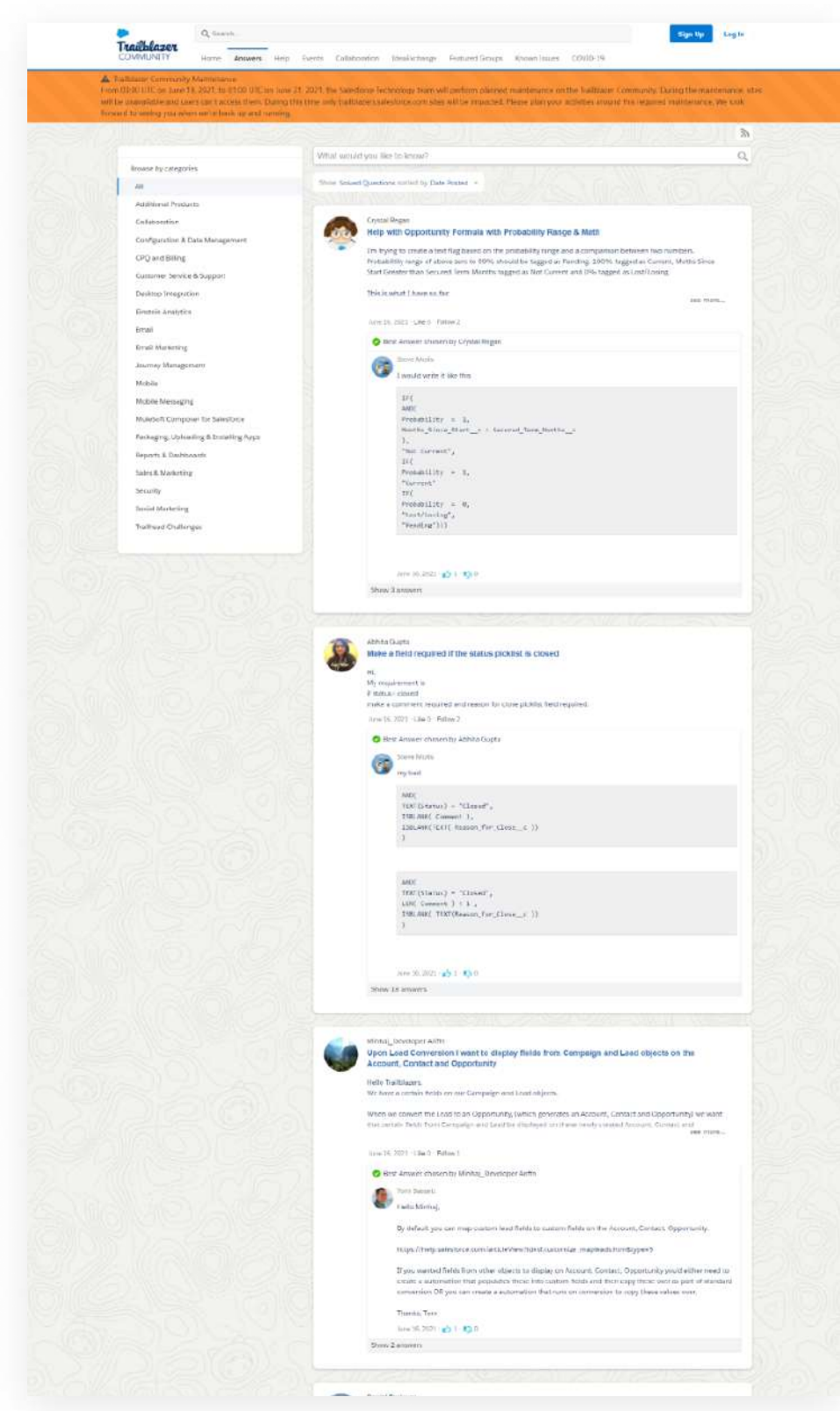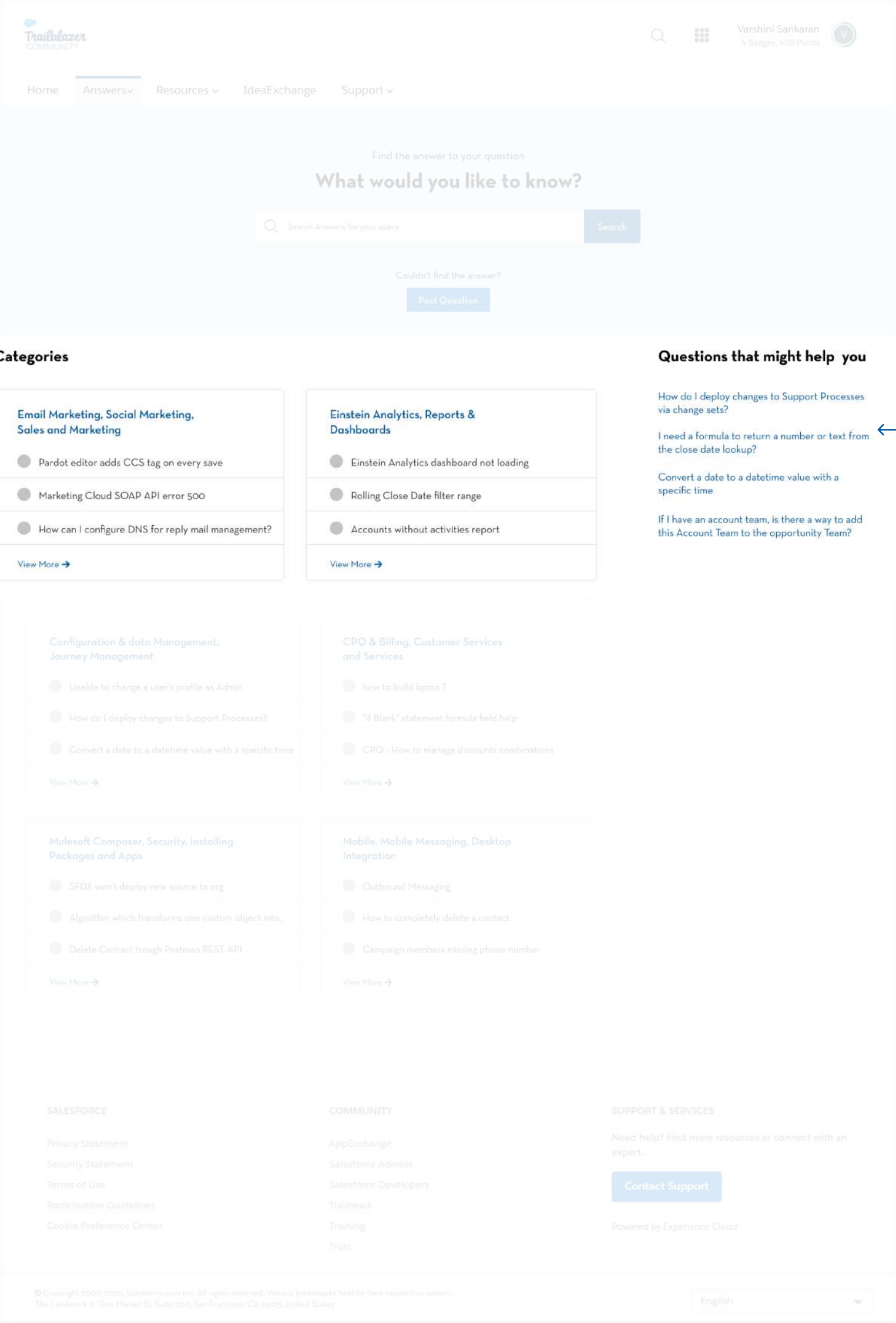
Trailblazer Filters
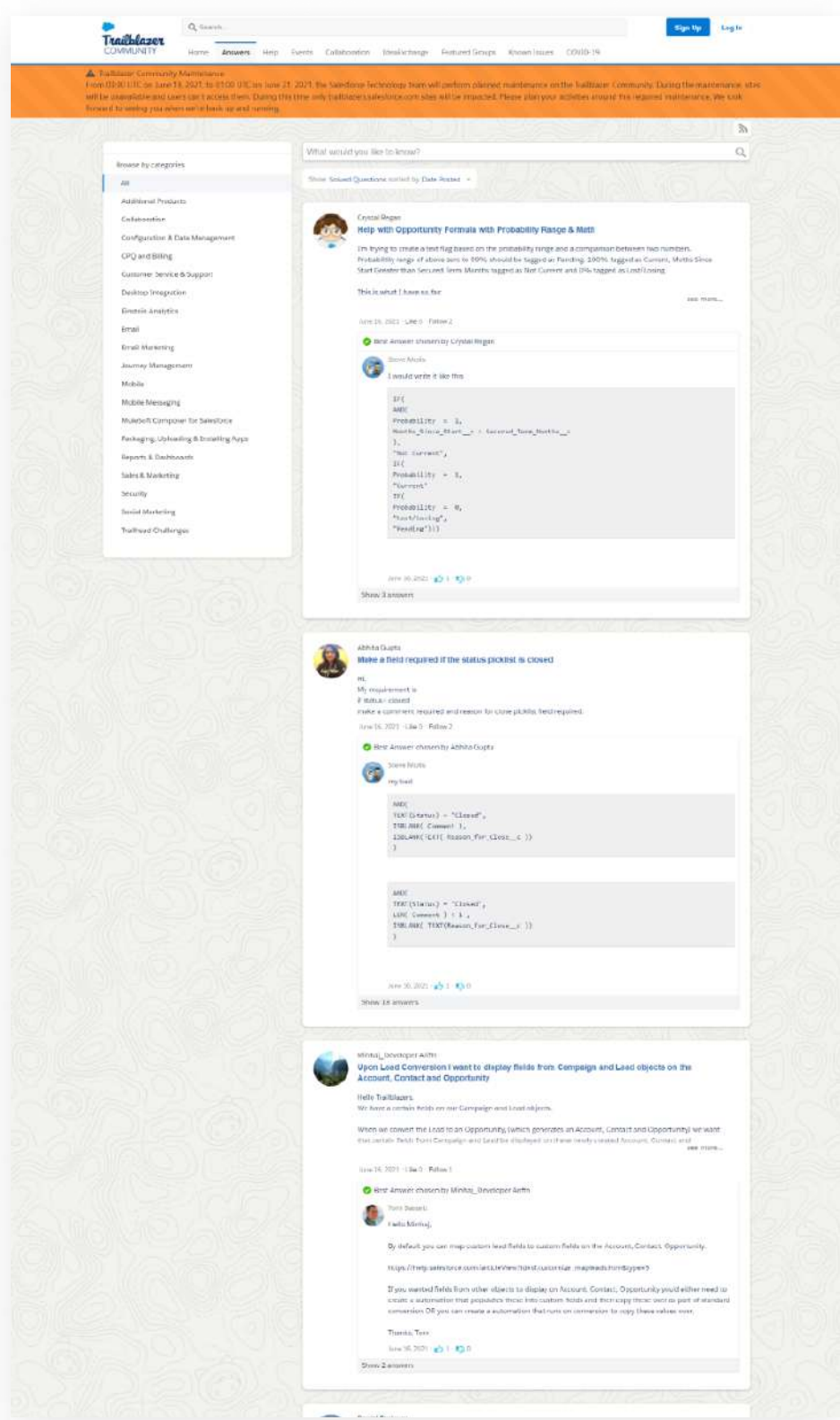
After
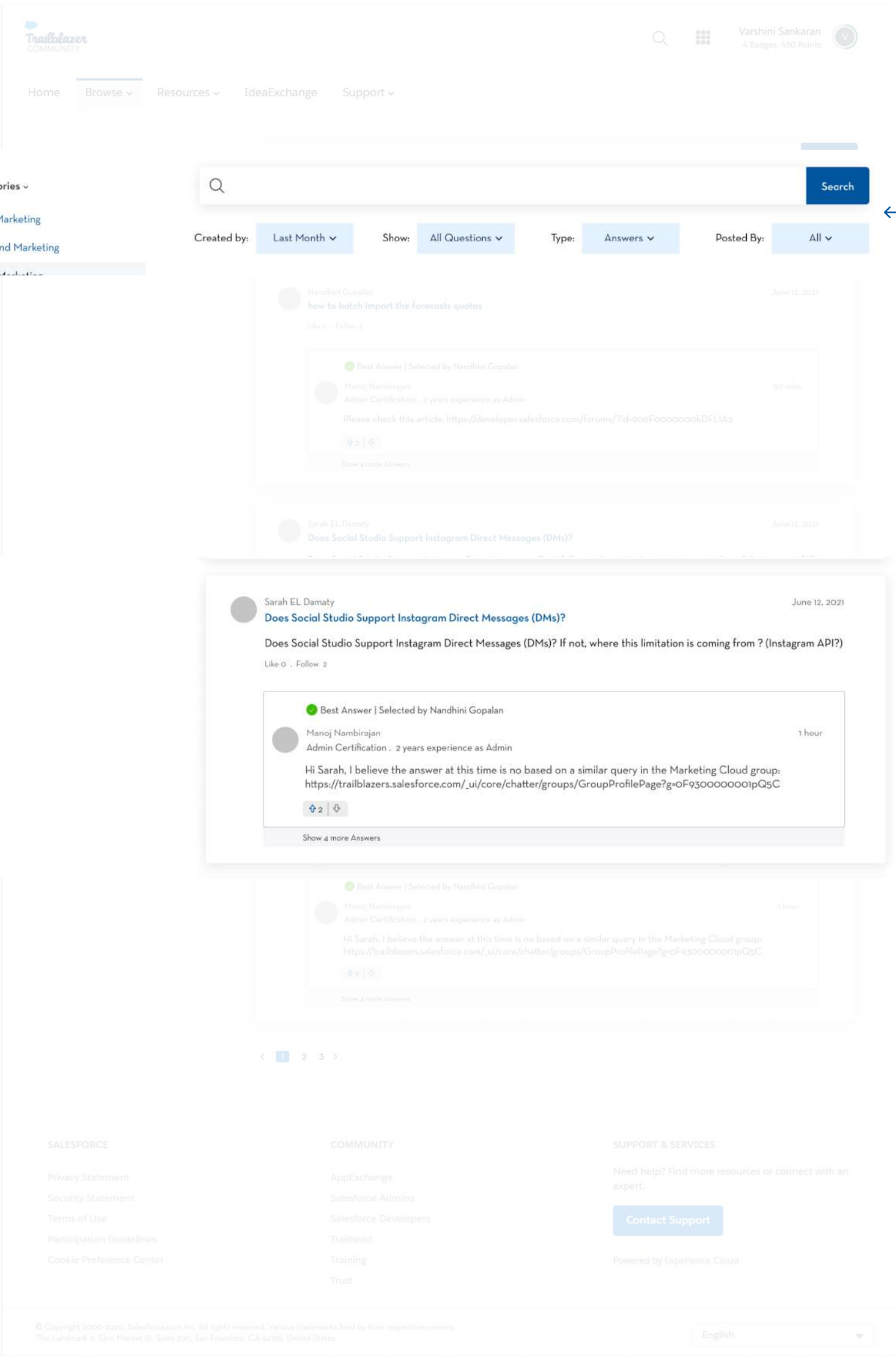
Efficient filters

Simplify the results

Trailblazer Search bar

SOLVED QUESTIONS

How can I update a social message that already posted (Twitter and LinkedIn)?	Jun 02, 2021
For LinkedIn social posting what image sizes work best and what do I add to tags section?	Jun 02, 2021
How to measure agent engagement/performance in Social Studio?	Jun 02, 2021

Social Marketing methods to increase engagement

Social media settings in company information

Social Marketing Essentials Edition include Social Personas for Leads?

After →

What would you like to know?

Enhanced the search results
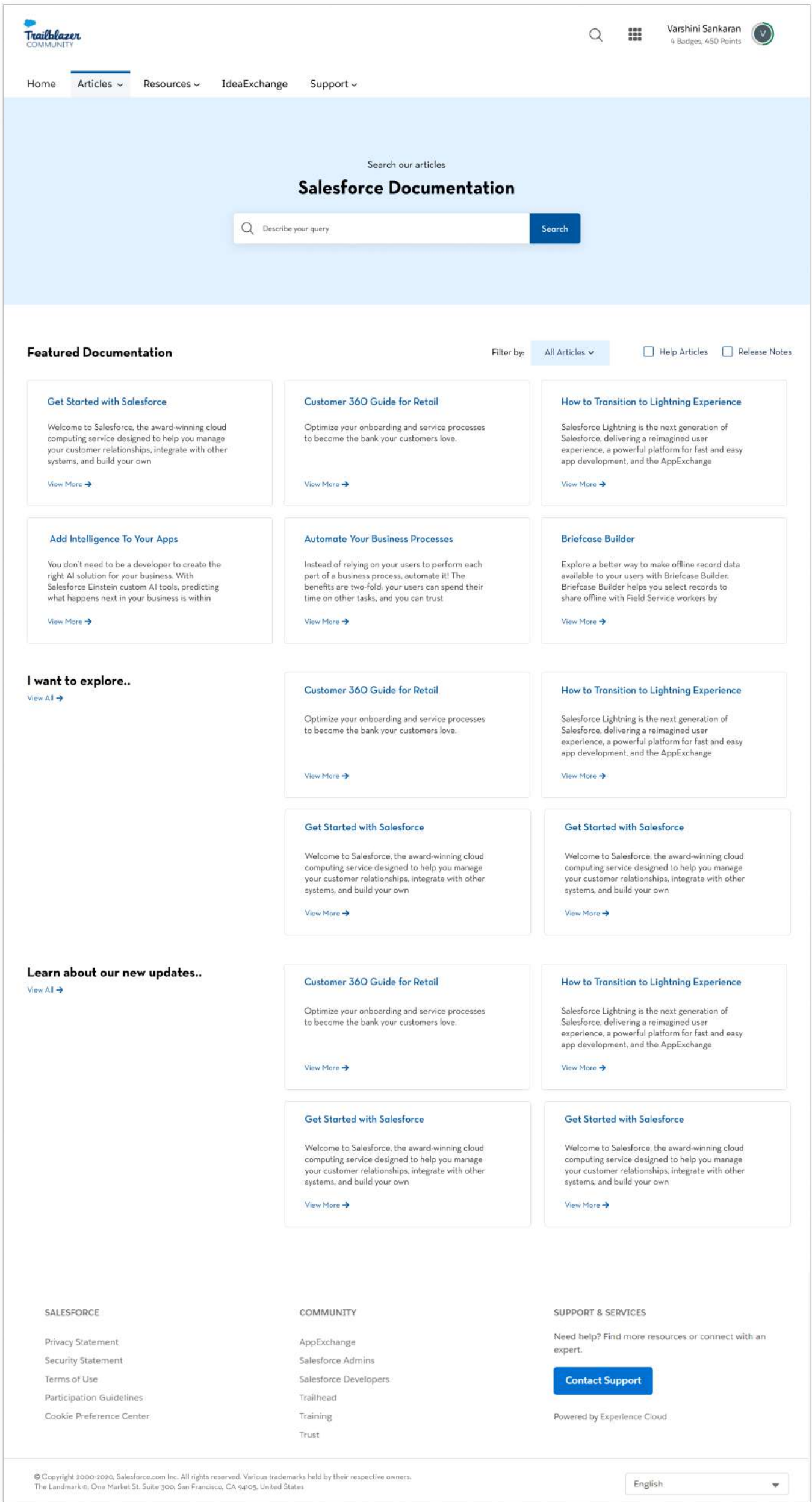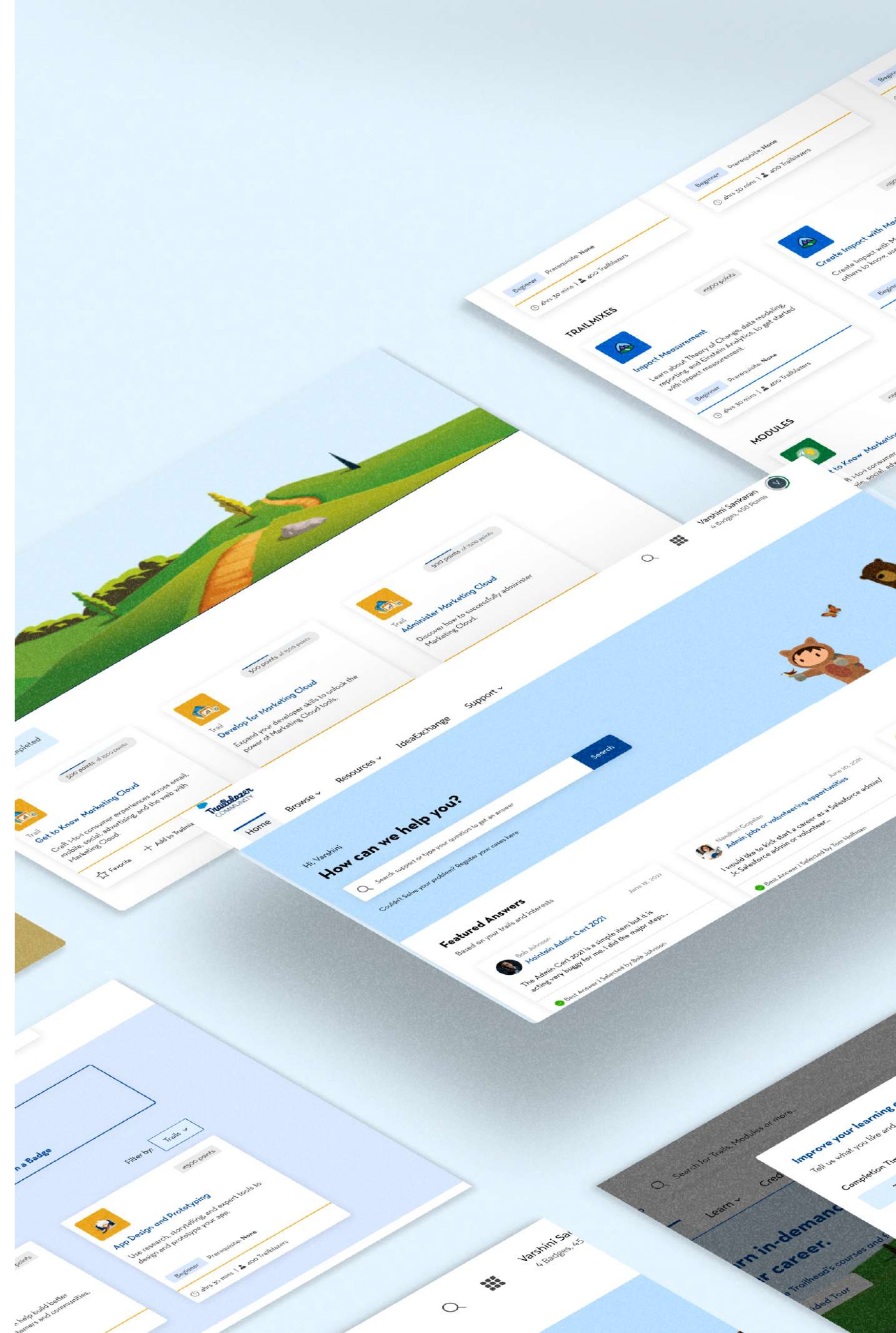
Trailblazer Documentation page
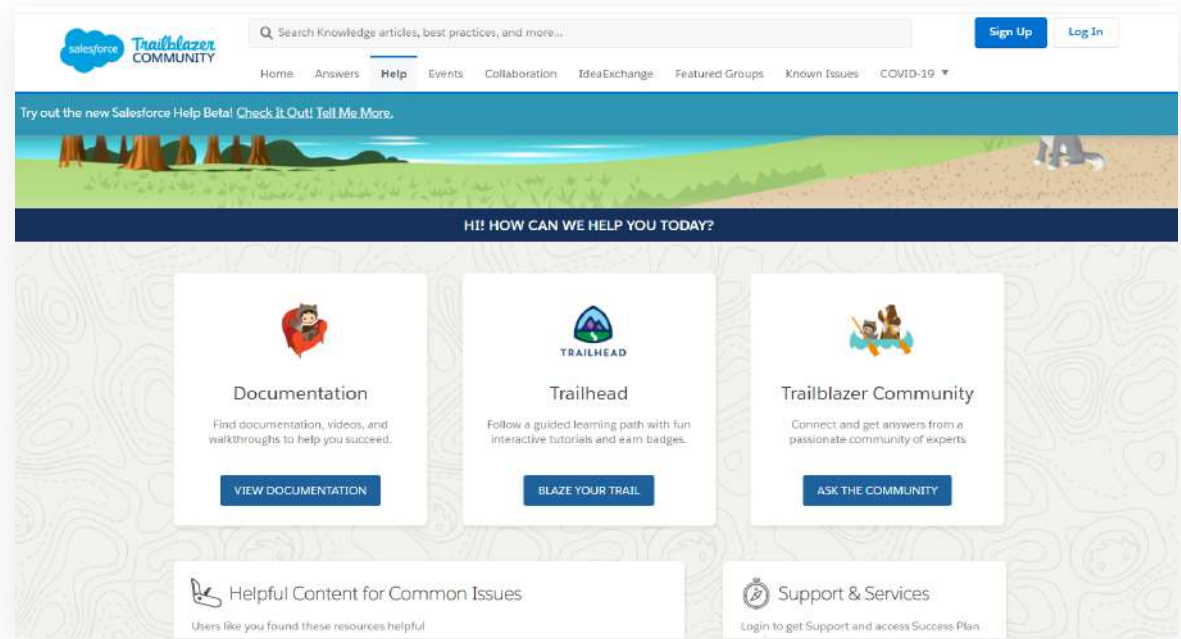
After

Cathering to the expert and novice users

Trailhead Onboarding Redesign

Trailblazer Onboarding step
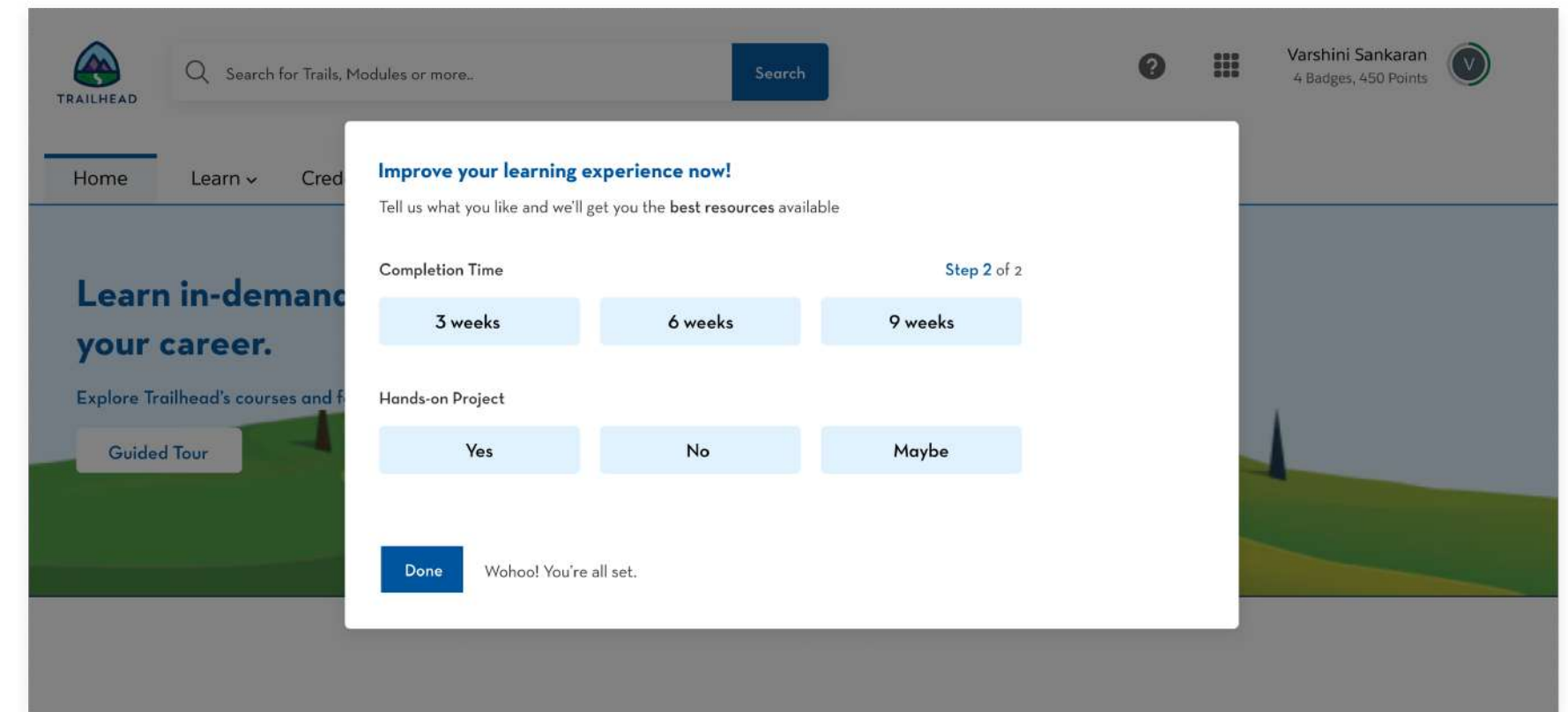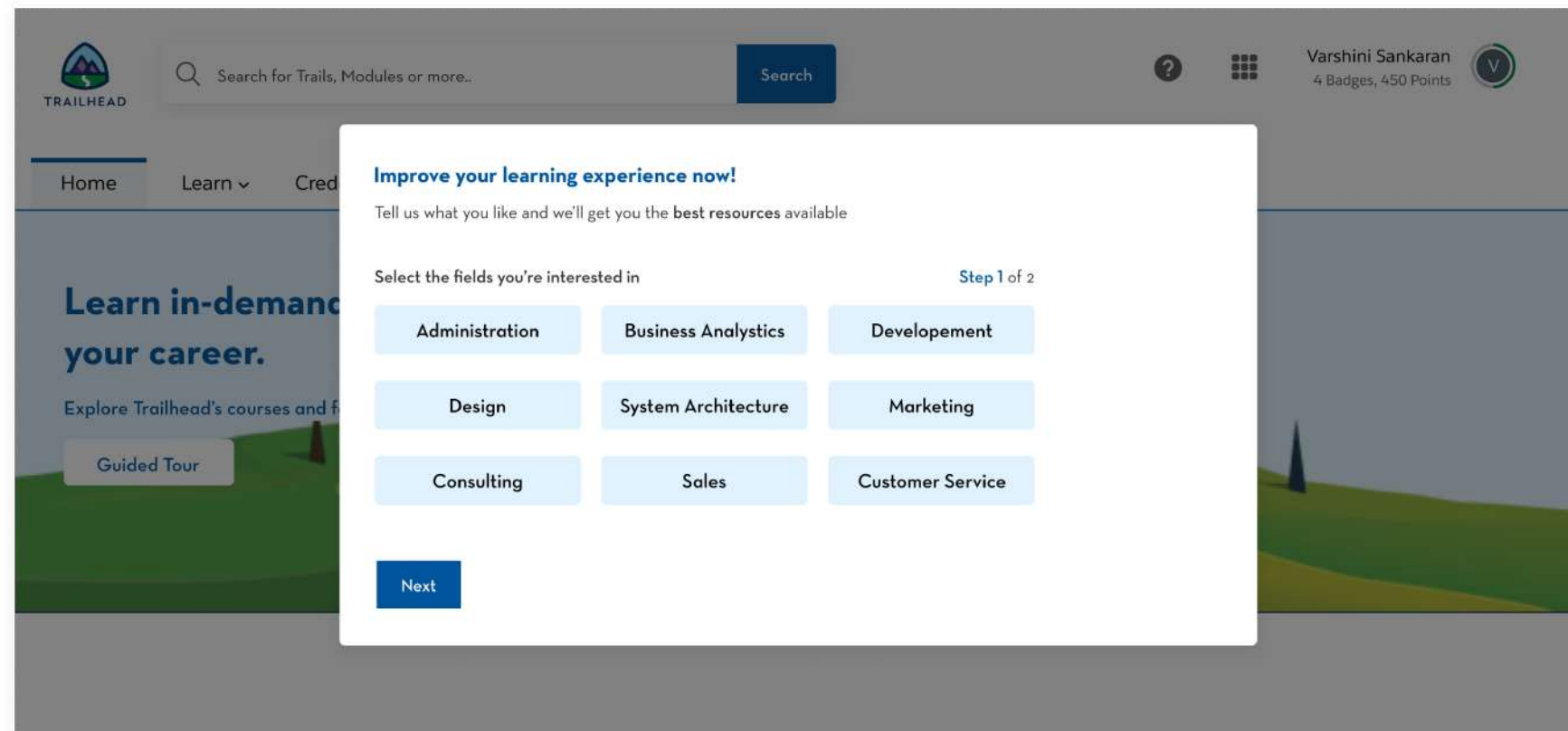
Personalize the User Experience.

Developing a connection with users strengthens their experience with your platform and leads them to build loyalty to your brand.

Asking the necessary questions.

This experience could be further improved by understanding what metrics user give importance to and what they expect to see after onboarding.

Trailhead **Home Page**
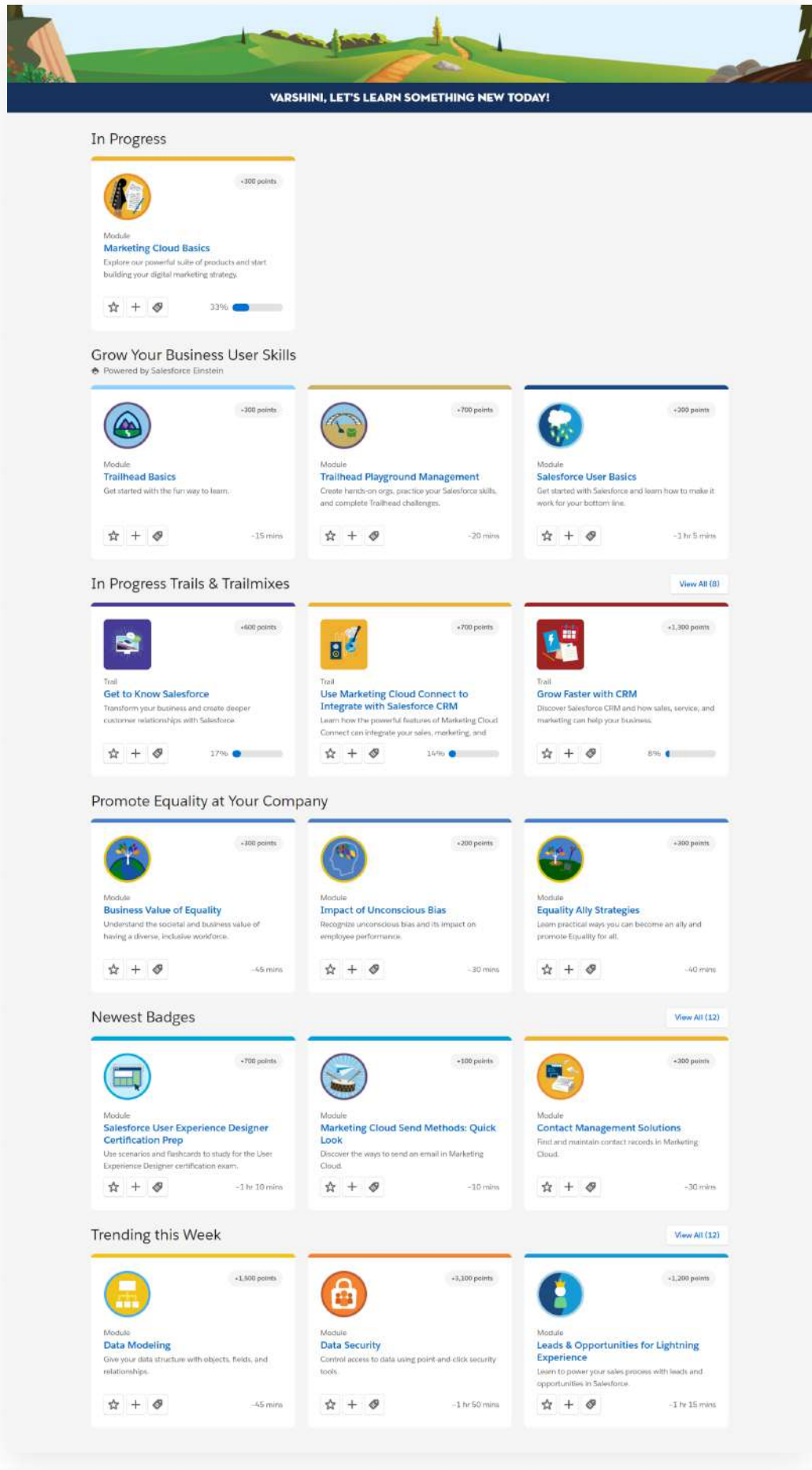
After →
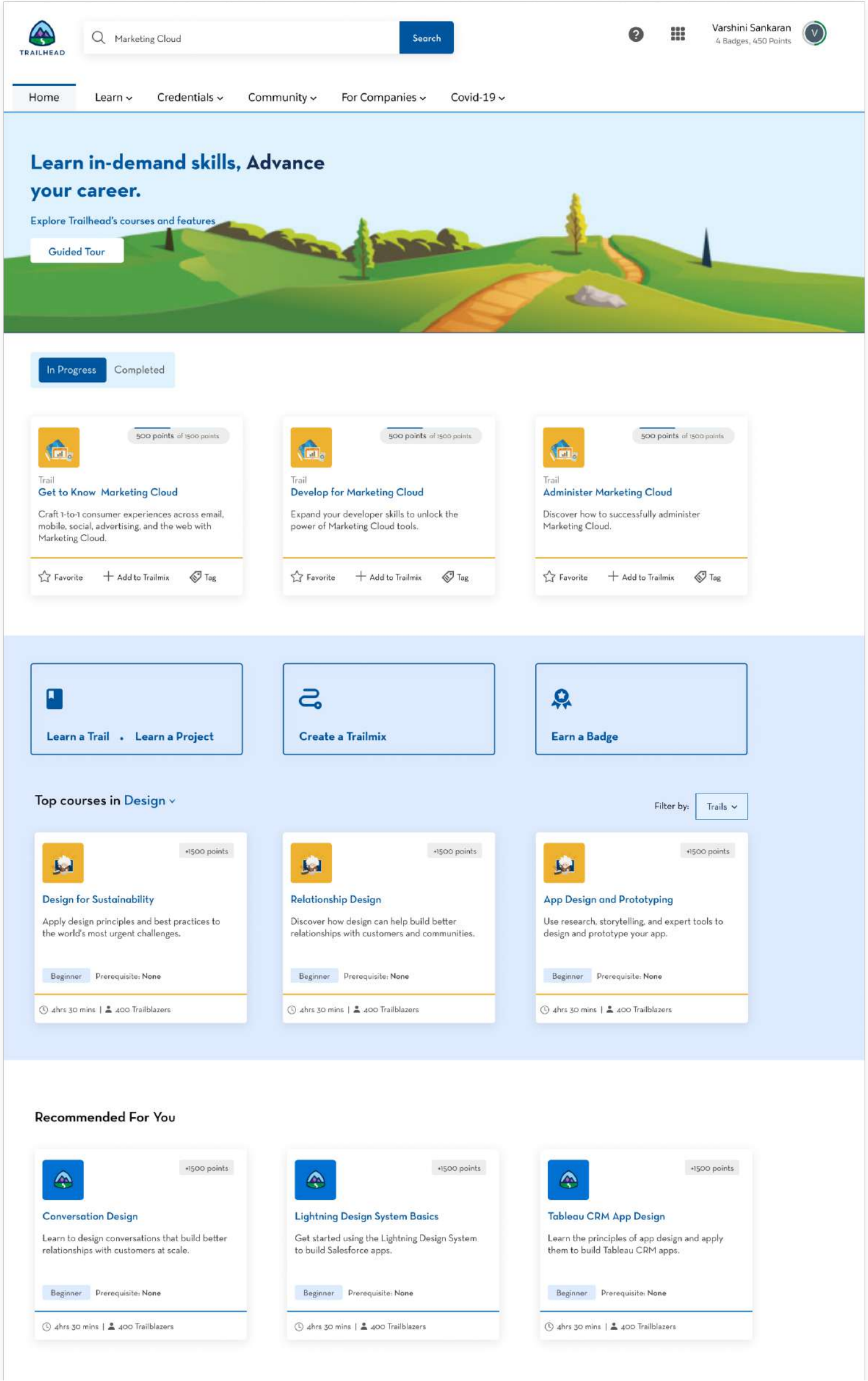
← **Educate** users

← **Motivate the** users

← **Introduce the** Features

Design Strategy

Net Promoter Score

Would you recommend this product or service to a friend or colleague?

Time-in-App

Time in app measures how long a user spent in your app over a period of time.

Customer Effort Score

We can measure success by asking a customer survey where users rank how easy it was to find a necessary information about a product.

What I'd do differently?

I would definitely make some bold changes, I would have loved to test out my design to validate my UI ideas.

1 User interviews

2 Information architecture

3 Usability testing

Wait, Trailblazer was recently redesigned..

I went back and checked the reimagined
Trailblazers and I'm happy to say I could
see few of my suggestions 😎

A dedicated search bar

Personalized group suggestions

V

Ask a question...

Fakhruddin Bandukwala (ITM) asked in * Trailhead *
I have a query on Hierarchical relationships.
This is the definition in the help article explaining relationships. Object Relationships Overview (salesforce.com). It is defined as "A special lookup relationship available for only the user object."

However, I see Hierarchy relationship is also present in Account object. This article Create a hierarchy (parent/child relationship) within the same object (salesforce.com) states - "Aside from Account Hierarchy, this is currently not a functionality provided by Salesforce CRM."

Both of these seem to be Hierarchy relationships. In Account it is used to create Parent-Child accounts. In User object it is used to create Manager-Employee hierarchy.

What is the difference in these hierarchy relationship type used in Account and User (if any)?

👍 1 like   💬 4 answers   ↗ Share   Feb 7, 3:31 AM

Recommended Groups

83,017 members
* Sales Cloud - Best Practices *   ⊕

75,670 members
Trailblazer Community Cove   ⊕

66,937 members
* Tableau CRM *   ⊕

Recommended Topics

3,326 discussing   ⊕

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Trailblazer Community

🌐 **Feed**
Connect with fellow Trailblazers

🗂️ **Groups**
Join groups to meet and collaborate with Trailblazers

#️⃣ **Topics**
Discover and follow featured and trending topics

📅 **Events**
Attend local and virtual events

Quick Links

Trailblazer Community Overview

Trailblazer Stories

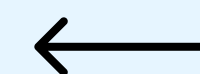Trailblazer Connect

Be a Multiplier

Salesforce MVPs

Quests

Salesforce Resources

IdeaExchange

Known Issues

Salesforce Help
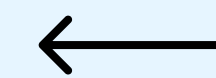
← Better grouping of categories

Sort		Answer Status		Featured Product Topics		Featured Other Topics		
Recent Activity	⌄	Select...	⌄	Select...	⌄	Select...	⌄	**More filters**

← Useful filters

Get help from the Community

V   **how to**

We found some similar questions

[Validation rule not working](#)

✓ Unanswered · 0 answers · Feb 8, 2022

Queue Visibility Question

✓ No best answer · 2 answers · Feb 8, 2022

alguem poderia me ajudar, gostaria de saber como eu retiro Zero á esquerda das Strings, qual seria a função para isso ?

✓ Unanswered · 0 answers · Feb 8, 2022

hard delete events

✓ Unanswered · 0 answers · Feb 8, 2022

Hey there, I am very new to this group. need your guidance. how can I work for salesforce and How it is provides jobs to a tech professionals

✓ No best answer · 1 answer · Feb 8, 2022

Formula lead syntax not working
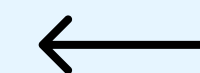
← Enhanced search bar experience

Thank you

Stay safe and warm