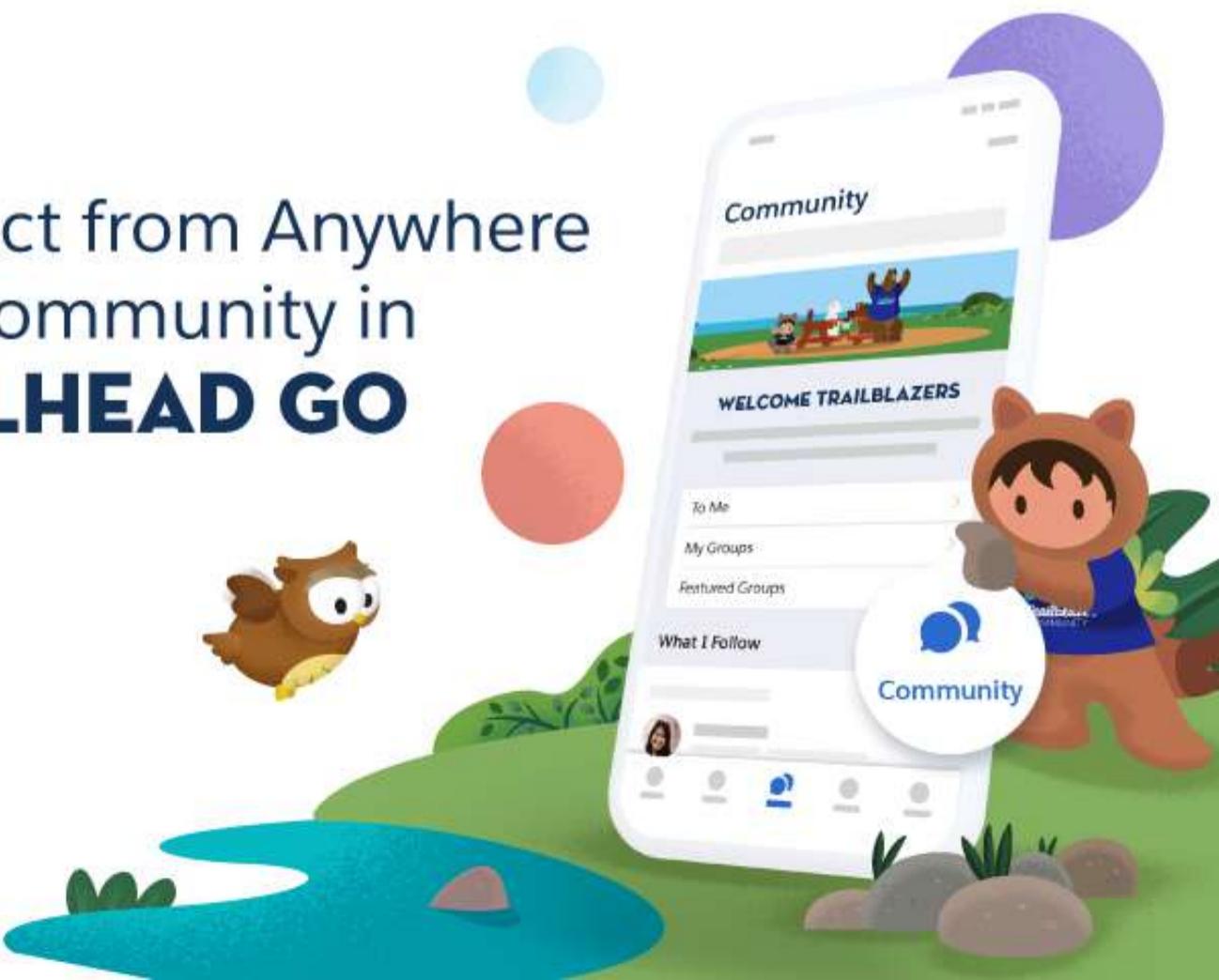


Salesforce Trailhead Redesign

Redesigning Trailblazer Community and
Trailhead Onboarding experience

Connect from Anywhere
with Community in
TRAILHEAD GO



Project Summary

Redesigning an experience for the Trailblazers that exposes, engages and encourages users to involve in the community and enable them in **finding content and navigating** in the platform with ease. Also, curating an **onboarding experience** that helps users to have a personalized content.

- | Role: User Experience Designer
- | Duration: 6 weeks (Research + Design)
- | Team: Independent

1 Research

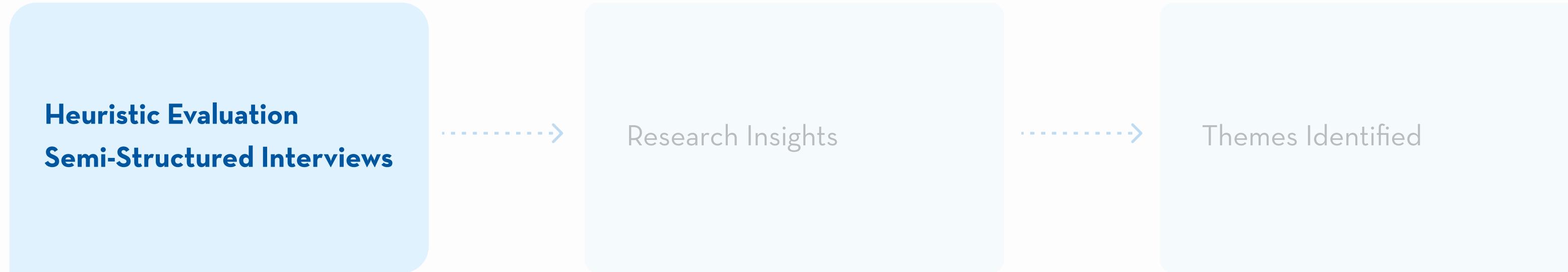
2 Strategy

3 Design



User Research

Research

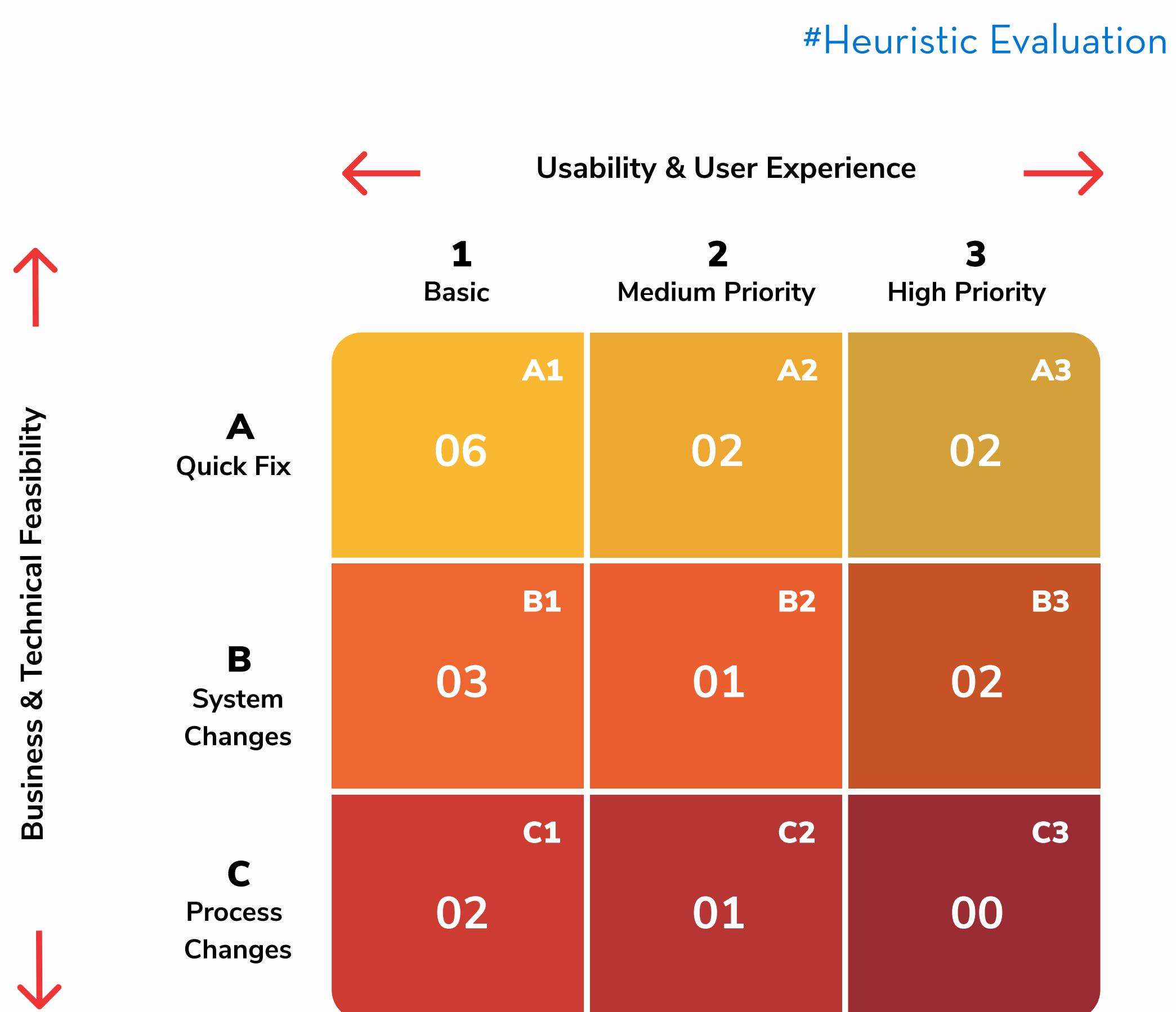


19

Problem Statements

25

Heuristic Violations



Questions and Participants

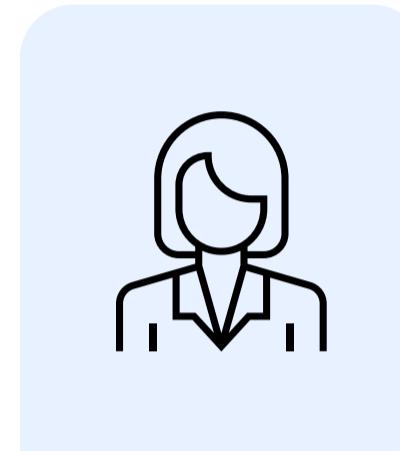
Research

TRAILBLAZER COMMUNITY

- Trailblazer context
- Navigation
- Posting questions
- Search bar



Trailhead exp - 2 years
Working Professional -
Service cloud



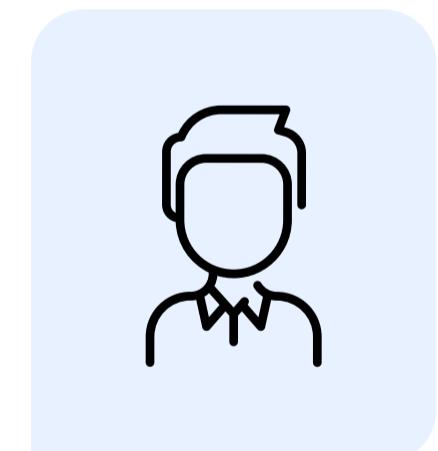
Trailhead exp - 1 year
Student - learning
modules



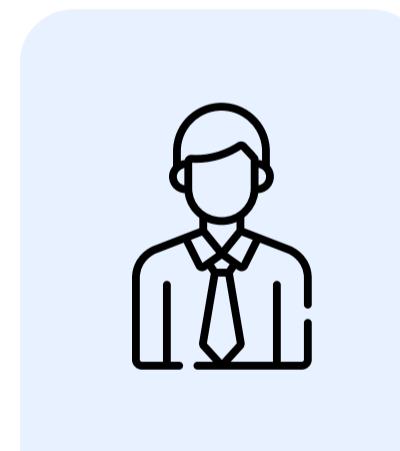
Trailhead exp - 0
Student - exploring
trailhead

TRAILHEAD PLATFORM

- Trailhead exploration
- Tasks



Trailhead exp - 1 year
Working professional -
Marketing cloud



Trailhead exp - 0
Student - exploring
trailhead

#Semi-Structured Interviews

User Research

Research



#Pain Points

Inefficient Search Engine

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

Overwhelming Navigation

"Too many tabs and redundant options present".

Unrelevant 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

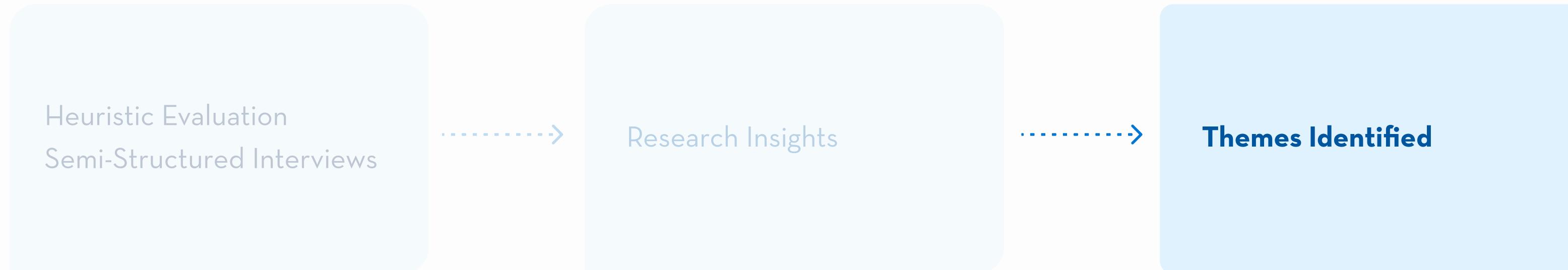
"Learning pattern could be improvised".

Journey Mapping

Phases	Discovery	Understanding Context	Clearing their doubts
Tasks	<ul style="list-style-type: none">• Landing on Trailblazer Community• Looking at the different tabs	<ul style="list-style-type: none">• Exploring different tabs to get the answers• Tries to understand the collaboration page	<ul style="list-style-type: none">• Uses the global search• Uses google search to get effective answers• Overwhelmed with the no.of tabs present to find an answer
PainPoints	<ul style="list-style-type: none">• Overwhelmed by the amount of information present• Redundant options frustrates the user	<ul style="list-style-type: none">• Confused where to post questions• User interface is not so interactive and engaging	<ul style="list-style-type: none">• Too many results to filter from the search• Missing out on answers and resorts to google search
Emotions			
Design Opportunity	<ul style="list-style-type: none">• Redesign the landing pages and the user flow to guide new and existing users	<ul style="list-style-type: none">• UI needs to be updated and context needs to be clear• Simplify the user steps by breaking down the no of steps to gain information	<ul style="list-style-type: none">• Effective filters and search engine redesign

User Research

Research



#How Might We?

How might we help the user to **navigate easily** to find the content?

How might we **encourage** the users to use trailblazer search more than google search?

How might we **guide** the user to find the answers in few steps?

How might we **suggest modules** that the user is looking for?

How might we **improve** the search engine efficiency?

How might we **reduce the recall** effort for the user?

1 Research

2 Strategy

3 Design



Developing a strategy: Solving the Problem

Strategy



Users struggled in understanding the **context of the platform as such and needed guidance at various stages.**

**A digital experience that exposes,
engages, and encourages users to increase
their participation in the community.**

Developing a strategy: Solving the Problem

Strategy

1. Help users find and engage with communities.
2. Enable users to search efficiently.
3. Increase the user engagement.

1 Research

2 Strategy

3 Design



Redesign #1

Trailblazer Community Redesign

[Home Page](#) | [Answers Page](#) | [Articles Page](#) | [Navigation](#)

Trailblazer Home Page

Welcome Trailblazers
Learn, connect, have fun, and give back together.

Answers
All questions, get tips, and share knowledge with the rest of the Trailblazer Community.

Answer Leaders
Meet the Trailblazers who go above and beyond to help community members succeed with Salesforce.

Collaborate
There's always a conversation happening in the Trailblazer Community. Jump in to add your voice and meet fellow Trailblazers.

Groups
Gather around the campfire with kindred spirits. Join the groups that match your experience and interests.

Salesforce Productivity
New to Dreamforce

Dreamforce for Small and Medium Business
Dreamforce for Small and Medium Business

JOIN THE CONVERSATION

LINKS
Privacy Statement
Security Statement
Terms of Use
Participation Guidelines
Cookie Preference Center

SALESFORCE
Salesforce.com
AppExchange
Salesforce Admins
Salesforce Developers
Trailhead

NEED HELP?
If you can't find what you're looking for, contact Salesforce Customer Support.

Powered by Community Cloud.

Welcome to the Trailblazer COMMUNITY
LET'S SUCCEED TOGETHER

Learn
Get help, answers, and inspiration from your peers and Community Leaders.

Connect
Meet Trailblazers like you and discover opportunities from mentorship to employment.

Have Fun
Enjoy an inclusive, welcoming culture and make friends from around the world.

Give Back
Inspire and mentor the next generation of Trailblazers while building your skills and reputation.

LINKS
Privacy Statement
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SALESFORCE
Salesforce.com
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Salesforce Developers
Trailhead

How can we help you?

Featured Answers
Based on your trails and interests

People to follow
Meet the Trailblazers who go above and beyond to help community members succeed with Salesforce.

IdeaExchange
The IdeaExchange is where you can share ideas with the Trailblazer Community and Salesforce product managers.

Explore Events
Learn in-person and virtually with peers, build your network, and find mentors with Trailblazer Community Groups.

Dedicated Search Bar
This reduces the cognitive effort of the user as it matches their mental model and also prompts the user in different ways.

User Guidance
Introducing groups and people helps the users to explore these without having to search for it.

Nudge User
Users found the IdeaExchange and Events interesting but they miss out on it due to abundant of information.

Explore Events
Learn in-person and virtually with peers, build your network, and find mentors with Trailblazer Community Groups.

SUPPORT & SERVICES
Need help? Find more resources or connect with an expert.

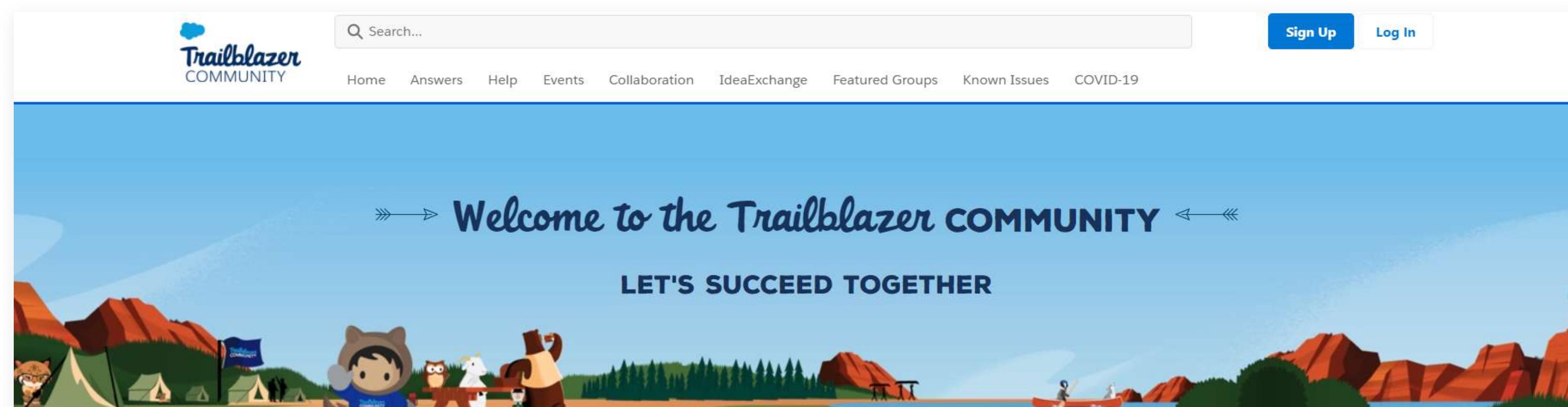
Contact Support

Community
AppExchange
Salesforce Admins
Salesforce Developers
Training
Trust

Salesforce
Privacy Statement
Security Statement
Terms of Use
Participation Guidelines
Cookie Preference Center

English

Trailblazer Navigation Menu



Choice Overload

Users were overwhelmed with the number of tabs, they often don't check out the tabs.

This screenshot shows the Trailblazer Community homepage with a user profile for Varshini Sankaran. The 'Resources' dropdown menu is open, displaying a list of options: Answers, Articles, Discussion, Known Issues, and Groups. The 'Search' bar at the bottom has the placeholder 'Search support or type your question to get an answer'.

This screenshot shows the Trailblazer Community homepage with a user profile for Varshini Sankaran. The 'Resources' dropdown menu is open, showing items grouped into categories: Developer Document, Non-Profit Document, Developer Forum, Videos, AppExchange, Salesforce Mobile, Knowledge Articles, Quick Starts, Trailhead, Getting Starting Articles, and Instructor-led Classes.

This screenshot shows the Trailblazer Community homepage with a user profile for Varshini Sankaran. The 'Support' dropdown menu is open, displaying options: Help Center, Your Cases, and Contact Us. The 'Search' bar at the bottom has the placeholder 'Search support or type your question to get an answer'.

Law of Proximity and Miller's law

Chunking similar options together reduces the cognitive load on the user.

Trailblazer Answers Page

The screenshot shows the Trailblazer Answers page with three questions listed:

- Help with Opportunity Formula with Probability Range & Math** by Crystal Regan: A formula question asking how to create a test tag based on probability range and comparison between two numbers. It includes code snippets for both IF and PFC logic.
- Make a field required if the status picklist is closed** by Abhita Gupta: A question about making a field required if the status is closed. It includes code snippets for validation logic.
- Upon Lead Conversion I want to display fields from Campaign and Lead objects on the Account, Contact and Opportunity** by Minali_Developer_Aritha: A question about mapping fields from Campaign and Lead objects to Account, Contact, and Opportunity during lead conversion. It includes code snippets for mapping logic.

The screenshot shows the Trailblazer Answers page with one question and a "Categories" section:

What would you like to know?

Find the answer to your question

Varshini Sankaran
4 Badges, 450 Points

Home Answers Resources IdeaExchange Support

Search Answers for your query

Couldn't find the answer? Post Question

Categories

Email Marketing, Social Marketing, Sales and Marketing

- Pardot editor adds CCS tag on every save
- Marketing Cloud SOAP API error 500
- How can I configure DNS for reply mail management?

Einstein Analytics, Reports & Dashboards

- Einstein Analytics dashboard not loading
- Rolling Close Date filter range
- Accounts without activities report

Configuration & data Management, Journey Management

- Unable to change a user's profile as Admin
- How do I deploy changes to Support Processes?
- Convert a date to a datetime value with a specific time

CPQ & Billing, Customer Services and Services

- how to build bpmn ?
- "If Blank" statement formula field help
- CPQ - How to manage discounts combinations

Mulesoft Composer, Security, Installing Packages and Apps

- SFDX won't deploy new source to org
- Algorithm which transforms one custom object into...
- Delete Contact through Postman REST API

Mobile, Mobile Messaging, Desktop Integration

- Outbound Messaging
- How to completely delete a contact
- Campaign members missing phone number

SALESFORCE

- Privacy Statement
- Security Statement
- Terms of Use
- Participation Guidelines
- Cookie Preference Center

COMMUNITY

- AppExchange
- Salesforce Admins
- Salesforce Developers
- Trailhead
- Training
- Trust

SUPPORT & SERVICES

Need help? Find more resources or connect with an expert.

Contact Support

Powered by Experience Cloud

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English

Law of Simplicity

People are drawn to perceive something that requires less mental effort.

User Support

Having these categories displayed helps both the experienced and novice users to solve their problems.

Trailblazer Answers Detailed Page

The screenshot shows the Trailblazer Answers page with a search query of "Social Marketing". The results are as follows:

- Result 1:** Nandini Gopalan asked "how to batch import the forecasts quotas". The answer was selected as Best Answer by Nandini Gopalan, posted on June 12, 2021. It includes a link to a developer forum article.
- Result 2:** Sarah EL Damaty asked "Does Social Studio Support Instagram Direct Messages (DMs)?". The answer was selected as Best Answer by Nandini Gopalan, posted on June 12, 2021. It includes a link to a similar query in the Marketing Cloud group.
- Result 3:** Sarah EL Damaty asked the same question again. The answer was selected as Best Answer by Nandini Gopalan, posted on June 12, 2021. It includes a link to the same Marketing Cloud group.

At the bottom, there are navigation arrows for pages 1, 2, 3, and >.

The screenshot shows the Trailblazer Answers page with a search query of "Social Marketing". The results include related questions:

- 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
- SEARCH RESULTS:**
 - Social Marketing methods to increase engagement
 - Social media settings in company information
 - Social Marketing Essentials Edition include Social Personas for Leads?

Updated Search Functionalities

Showing related search queries helps the user in solving their issues with ease.

Efficient Filters

Users wants to see the most recent questions and answers that are posted that would help them.

Simplify the User Experience

By simply showing the best answers, the Salesforce team helped the user to find the best answer in no time.

Trailblazer Articles Page

The screenshot shows the Trailblazer Community homepage. At the top, there's a search bar and navigation links for Home, Answers, Help, Events, Collaboration, IdeaExchange, Featured Groups, Known Issues, and COVID-19. A banner at the top says "Try out the new Salesforce Help Beta! Check It Out! Tell Me More." Below the banner, there's a section titled "HII! HOW CAN WE HELP YOU TODAY?" with three cards: "Documentation" (with a knight icon), "Trailhead" (with a mountain icon), and "Trailblazer Community" (with a person icon). Below these are two boxes: "Helpful Content for Common Issues" and "Support & Services".

The screenshot shows the Trailblazer Answers page. At the top, there's a search bar and navigation links for Home, Answers, Help, Events, Collaboration, IdeaExchange, Featured Groups, Known Issues, and COVID-19. A banner at the top says "Trailblazer Community Maintenance". Below the banner, there's a sidebar with "Browse by categories" and a main area showing user posts. One post by "Crystal Regan" discusses "Help with Opportunity Formula with Probability Range & Math" and includes a code snippet:

```
If(
    AND(
        Probability = 1,
        Months_Elapsed_Start_c < Secured_Term_Months_c
    )
)
But Current;
If(
    Probability = 1,
    "Current"
)
Probability = 0,
"not(Losing",
"Pending"));
```

Another post by "Abhita Gupta" discusses "Make a field required if the status picklist is closed" and includes a code snippet:

```
AND(
    TEXT(Status) = "Closed",
    ISBLANK(Comment),
    ISBLANK(Reason_for_Close_c)
)
```

A third post by "Minraj_Developer_Arith" discusses "Upon Lead Conversion I want to display fields from Campaign and Lead objects on the Account, Contact and Opportunity" and includes a code snippet:

```
By default you can map custom lead fields to custom fields on the Account, Contact, Opportunity.
```

The screenshot shows the Salesforce Documentation homepage. At the top, there's a search bar and navigation links for Home, Articles, Resources, IdeaExchange, and Support. A banner at the top says "Search our articles" and "Salesforce Documentation". Below the banner, there's a search bar and a "Search" button.

The screenshot shows the "Featured Documentation" section of the Salesforce Documentation homepage. It features three cards: "Get Started with Salesforce", "Customer 360 Guide for Retail", and "How to Transition to Lightning Experience". Below these are sections for "I want to explore..", "Learn about our new updates..", and "SALESFORCE", "COMMUNITY", "SUPPORT & SERVICES" sections. A sidebar on the right says "Catering to both experienced and new users." and "Not all the users would know what they're looking for. Having such categories would not break their user flow."

Featured Documentation

Filter by: All Articles ▾ Help Articles Release Notes

- Get Started with Salesforce**
- Customer 360 Guide for Retail**
- How to Transition to Lightning Experience**
- Add Intelligence To Your Apps**
- Automate Your Business Processes**
- Briefcase Builder**
- Customer 360 Guide for Retail**
- How to Transition to Lightning Experience**
- Get Started with Salesforce**
- Get Started with Salesforce**
- Customer 360 Guide for Retail**
- How to Transition to Lightning Experience**
- Get Started with Salesforce**
- Get Started with Salesforce**

Catering to both experienced and new users.

Not all the users would know what they're looking for. Having such categories would not break their user flow.

Salesforce Documentation

Search your query Search

I want to explore..

Learn about our new updates..

SALESFORCE

- Privacy Statement
- Security Statement
- Terms of Use
- Participation Guidelines
- Cookie Preference Center

COMMUNITY

- AppExchange
- Salesforce Admins
- Salesforce Developers
- Trailhead
- Training
- Trust

SUPPORT & SERVICES

- Need help? Find more resources or connect with an expert.
- Contact Support

Powered by Experience Cloud

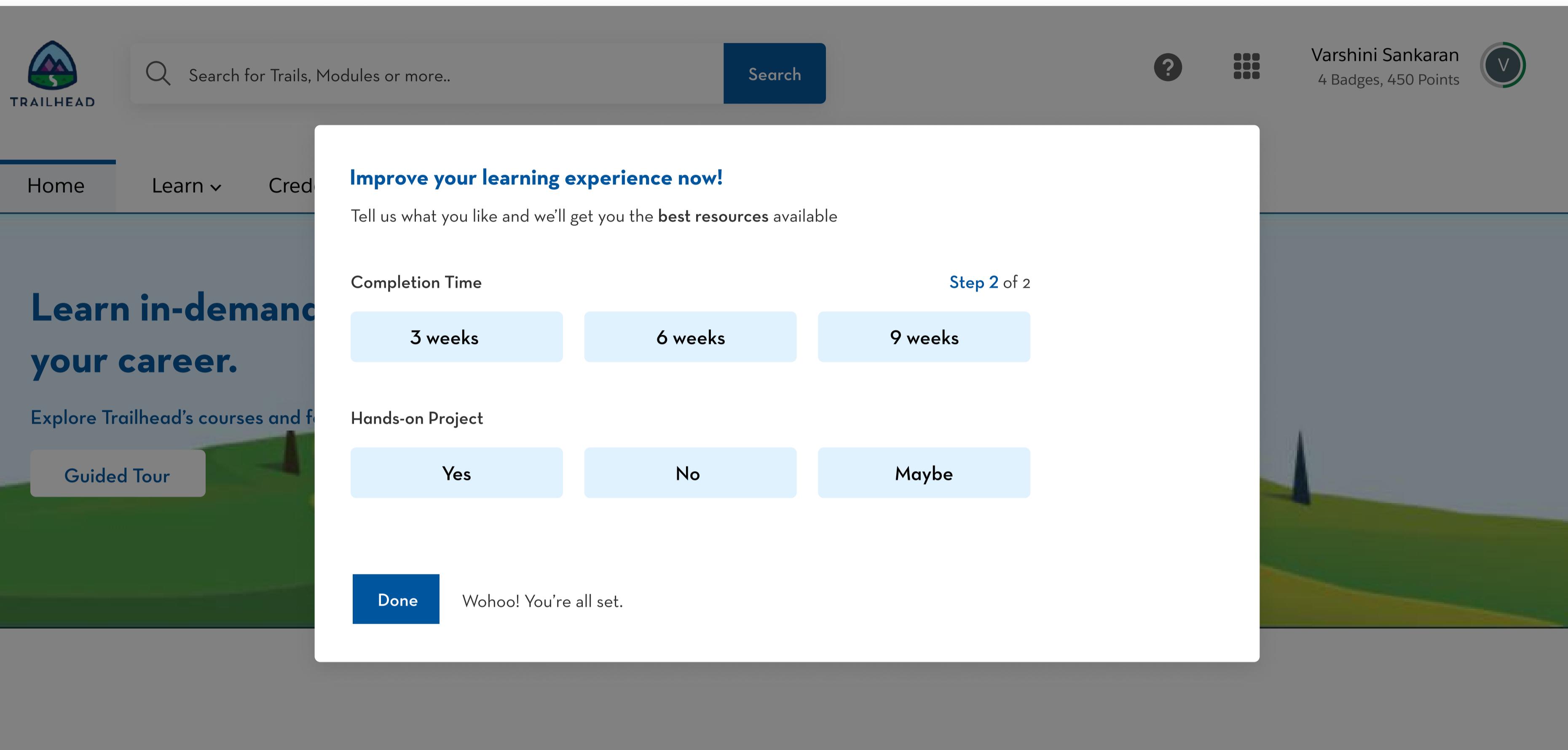
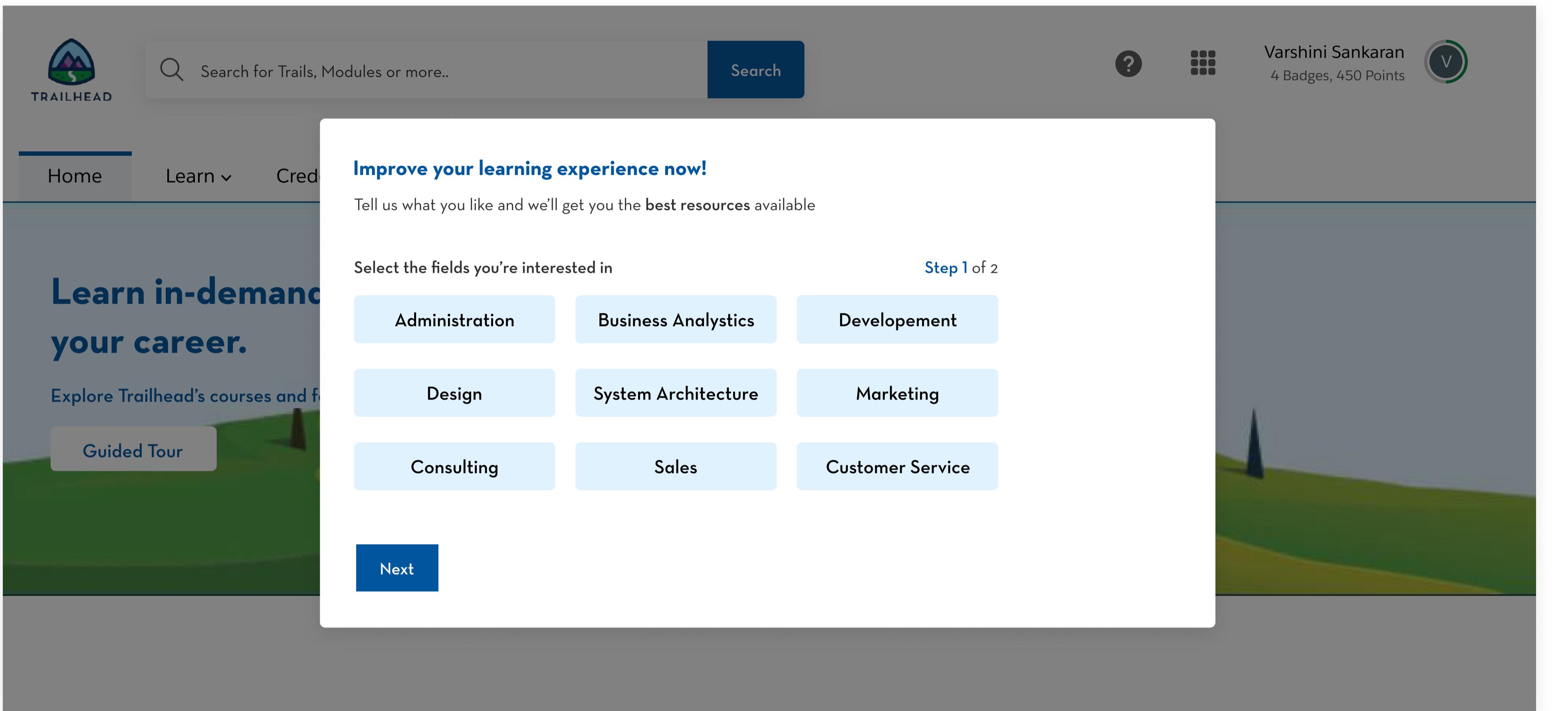
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English ▾

Trailhead Onboarding Redesign

[Onboarding Page](#) | [Home Page](#) | [Search Results Page](#)

Trailhead Onboarding Page



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

The Trailhead Home Page features a vibrant landscape header with the text "VARSHINI, LET'S LEARN SOMETHING NEW TODAY!". Below the header, the page is divided into several sections:

- In Progress:** Shows a module titled "Marketing Cloud Basics" with a progress bar at 33%.
- Grow Your Business User Skills:** Powered by Salesforce Einstein, this section includes modules like "Trailhead Basics" (300 points), "Trailhead Playground Management" (700 points), and "Salesforce User Basics" (300 points).
- In Progress Trails & Trailmixes:** Lists trails such as "Get to Know Salesforce" (600 points), "Use Marketing Cloud Connect to Integrate with Salesforce CRM" (700 points), and "Grow Faster with CRM" (1,300 points).
- Promote Equality at Your Company:** Modules include "Business Value of Equality" (300 points), "Impact of Unconscious Bias" (200 points), and "Equality Ally Strategies" (300 points).
- Newest Badges:** Shows badges for "Salesforce User Experience Designer Certification Prep" (700 points), "Marketing Cloud Send Methods: Quick Look" (100 points), and "Contact Management Solutions" (300 points).
- Trending this Week:** Lists trending modules: "Data Modeling" (+1,500 points), "Data Security" (+3,100 points), and "Leads & Opportunities for Lightning Experience" (+1,200 points).
- Learn, Credentials, Community, Extras:** Links to Trailblazer Community, myTrailhead, Customer Stories, Trail Tracker, Sample Gallery, Trailhead Store, and Trailblazer Connect.

The Marketing Cloud page on Trailhead includes the following sections:

- Learn in-demand skills, Advance your career:** A guided tour introduction with a "Guided Tour" button.
- In Progress vs Completed:** Buttons for "In Progress" and "Completed" modules.
- Featured Courses:** Three trails: "Get to Know Marketing Cloud" (500 points of 1500), "Develop for Marketing Cloud" (500 points of 1500), and "Administer Marketing Cloud" (500 points of 1500).
- Key Features:** Buttons for "Learn a Trail", "Create a Trailmix", and "Earn a Badge".
- Top courses in Design:** Filtered by "Trails", showing "Design for Sustainability" (1500 points), "Relationship Design" (1500 points), and "App Design and Prototyping" (1500 points).
- Recommended For You:** Three recommended courses: "Conversation Design" (1500 points), "Lightning Design System Basics" (1500 points), and "Tableau CRM App Design" (1500 points).
- Footer Links:** SALESFORCE (Privacy Statement, Security Statement, Terms of Use, Participation Guidelines, Cookie Preference Center), COMMUNITY (AppExchange, Salesforce Admins, Salesforce Developers, Trailhead, Training, Trust), and SUPPORT & SERVICES (Contact Support, Powered by Experience Cloud).
- Page Bottom:** Copyright notice, powered by Experience Cloud, language selection (English), and a footer banner.

Educate the User

Since Trailhead has so many features, it is a good strategy to provide a guided tour for the users who want to explore the platform to the fullest.

Motivate the User

By showing both In Progress and Completed modules, it helps user to see how far they have come.

Introduce the features

Reinforce important functionalities that would help the users in crafting their learning journey.

Trailhead Search Results Page

This screenshot shows the Trailhead search results page for 'marketing cloud'. The search bar at the top contains the query 'marketing cloud'. Below the search bar, there are filters for 'Role', 'Level', 'Products', 'Tags', and 'Content Type', with 'Most Relevant' selected. The main content area displays a list of 3626 results, each with a thumbnail, title, points, and a progress bar indicating completion percentage. The results include various trails and modules such as 'Get to Know Marketing Cloud', 'Marketing Cloud Basics', 'Use Marketing Cloud Connect to Integrate with Salesforce CRM', 'Develop for Marketing Cloud', 'Administrator Marketing Cloud', 'Google Analytics 360 Integration for Marketing Cloud', 'Engage Constituents with Nonprofit Cloud', 'Grow Faster with CRM', 'Measure Your Marketing Impact', and 'Go Digital Fast with the Salesforce Customer 360'. At the bottom of the page, there are links for 'Learn', 'Credentials', 'Community', 'Extras', and download links for the App Store and Google Play.

This screenshot shows the Trailhead home page. A search bar at the top right contains the query 'Search for modules, trails or more...'. Below the search bar, there are sections for 'RECENT' and 'TRENDING' with various links. On the right side, there is a large, colorful illustration of a path through a green landscape. The top right corner shows the user profile of 'Varshini Sankaran' with 4 badges and 450 points.

Assist the User
Search is primarily used in 2 situations. Either when a learner is unable to find something or when they want to find something very specific.

Good UX comes into the picture when the learner is assisted while they are searching.

This screenshot shows the Trailhead search results page for 'Marketing Cloud'. The search bar at the top contains the query 'Marketing Cloud'. Below the search bar, there are filters for 'Role', 'Level', 'Product', and 'Content Type', with 'Most Relevant' selected. The main content area displays a list of 1000 results under the heading 'SEARCH RESULTS FOR 'MARKETING CLOUD''. The results are categorized into 'TRAILS' and 'TRAILMIXES', each with several items. Each item has a thumbnail, title, points, and a progress bar. For example, the 'Get to Know Marketing Cloud' trail has 1500 points and is at 4% completion. The 'TRAILMIXES' section includes 'Impact Measurement', 'Create Impact with Marketing', and 'Build Your Marketing Career on Salesforce'. At the bottom of the page, there are links for 'Learn', 'Credentials', 'Community', 'Extras', and download links for the App Store and Google Play.

This screenshot shows the Trailhead search results page for 'Marketing Cloud' with the 'POPULAR' filter selected. The main content area displays a list of 1000 results under the heading 'SEARCH RESULTS FOR 'MARKETING CLOUD''. The results are categorized into 'TRAILS' and 'TRAILMIXES', each with several items. Each item has a thumbnail, title, points, and a progress bar. For example, the 'Get to Know Marketing Cloud' trail has 1500 points and is at 4% completion. The 'TRAILMIXES' section includes 'Impact Measurement', 'Create Impact with Marketing', and 'Build Your Marketing Career on Salesforce'. At the bottom of the page, there are links for 'Learn', 'Credentials', 'Community', 'Extras', and download links for the App Store and Google Play.

After Search
Breaking down into different sections and having the popular and recent filters help the user to decide quicker.

This screenshot shows the Trailhead search results page for 'Marketing Cloud' with the 'POPULAR' filter selected. The main content area displays a list of 1000 results under the heading 'SEARCH RESULTS FOR 'MARKETING CLOUD''. The results are categorized into 'TRAILS', 'TRAILMIXES', 'MODULES', 'PROJECTS', 'SALESFORCE', 'COMMUNITY', and 'SUPPORT & SERVICES'. Each category contains several items with thumbnails, titles, points, and completion percentages. For example, the 'TRAILS' section includes 'Get to Know Marketing Cloud', 'Develop for Marketing Cloud', and 'Administrator Marketing Cloud'. The 'SALESFORCE' section includes 'Dashboards for Sales and Marketing', 'Set Up Collaborative Forecasts', and 'Evaluate Report Data with Formulas'. The 'COMMUNITY' section includes links to AppExchange, Salesforce Admins, and Trailhead. The 'SUPPORT & SERVICES' section includes a 'Contact Support' button and a note about finding resources or connecting with experts. At the bottom of the page, there are links for 'Learn', 'Credentials', 'Community', 'Extras', and download links for the App Store and Google Play.

If I Had More Time
(Or If I Was Proactive)

What I'd do differently..

#1

USER INTERVIEWS

#2

MICRO-INTERACTIONS

#3

CONNECT WITH THE TEAM

The End



Thank You