

SUCCESSFACTORS
LEARNING

IMPROVING OUR LEARNING NOTIFICATIONS

A little story from the inbox...



YOUR PRESENTER TODAY

- Learning Systems Advisor in an HR technology team (within HR), at a global mining company since late 2022.
- Prior to that I was a consulting manager in a global consultancy focusing on SuccessFactors; and I was the UK lead for SuccessFactors Learning and Employee Central Service Centre.
- I live just outside the historic city of York in the north of the UK.



Stephen Millard

stephenmillard.com

THE PLAN

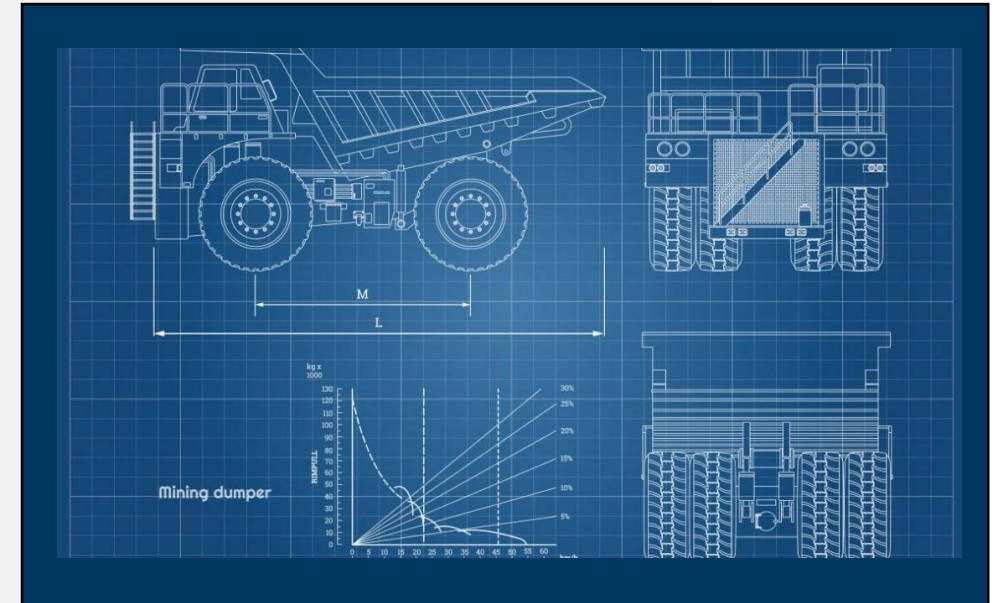
“A bit about...”

The business request

The general approach

The result

The toolkit



**WE WANT “BETTER”
NOTIFICATIONS**

Send...

OUR LEARNING ECOSYSTEM

LMS: SuccessFactors Learning

10

Company driven learning

LXP: Degreed

20

Self and peer driven learning

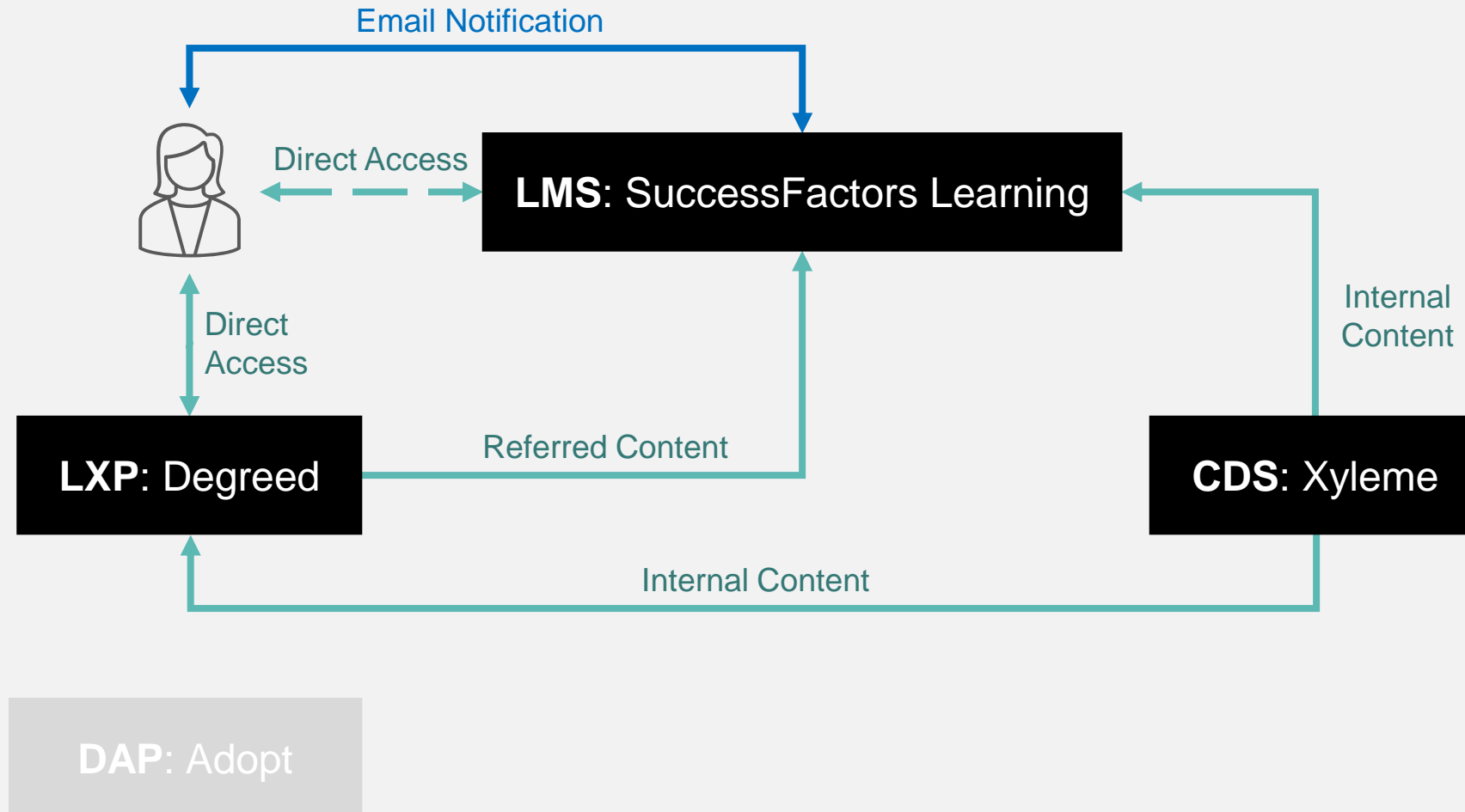
DAP: Adopt

70

In-flow learning and guidance

Like many large organisations we have a complex ecosystem of learning tools, content providers, etc. The keystone digital systems that act as an interface to deliver content to end user needs come down to three systems.

OUR LEARNING ECOSYSTEM

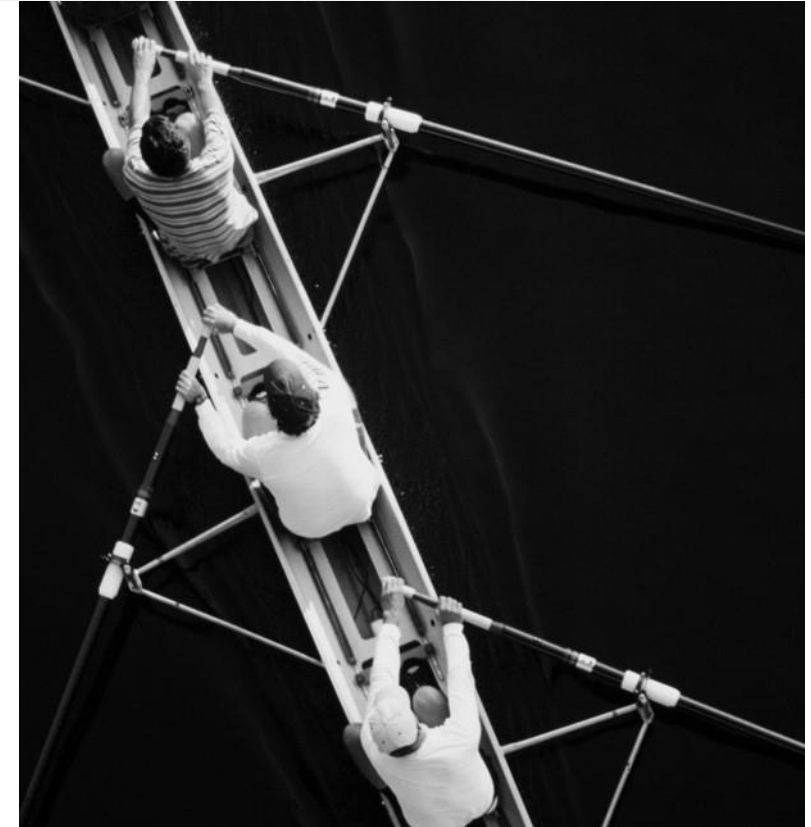


The main entry point for our end users on mandatory digital training is via e-mail notification.

THE TASK

“Better” E-mail Notifications

- Engaging content
- Visually appealing
- Cross-platform



ENGAGING CONTENT

- Clear language
- Positive phrasing
- Minimal



Learning Specialists

VISUALLY APPEALING

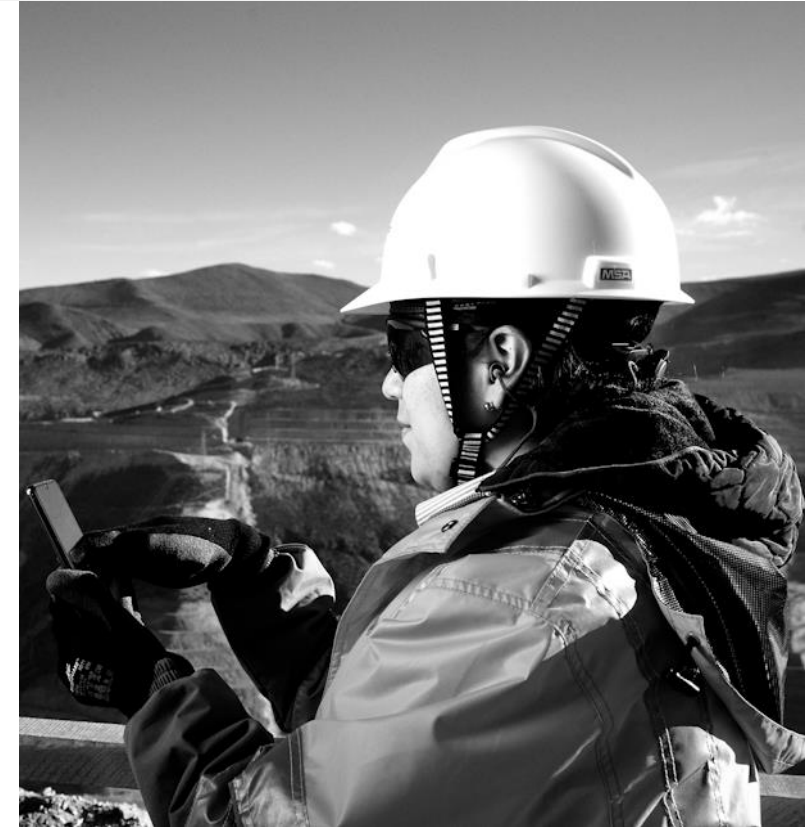
- Easy to read layout
- Consistent styling
- Branding



Technical Specialists

CROSS PLATFORM

- Desktop apps
- Web
- Mobile



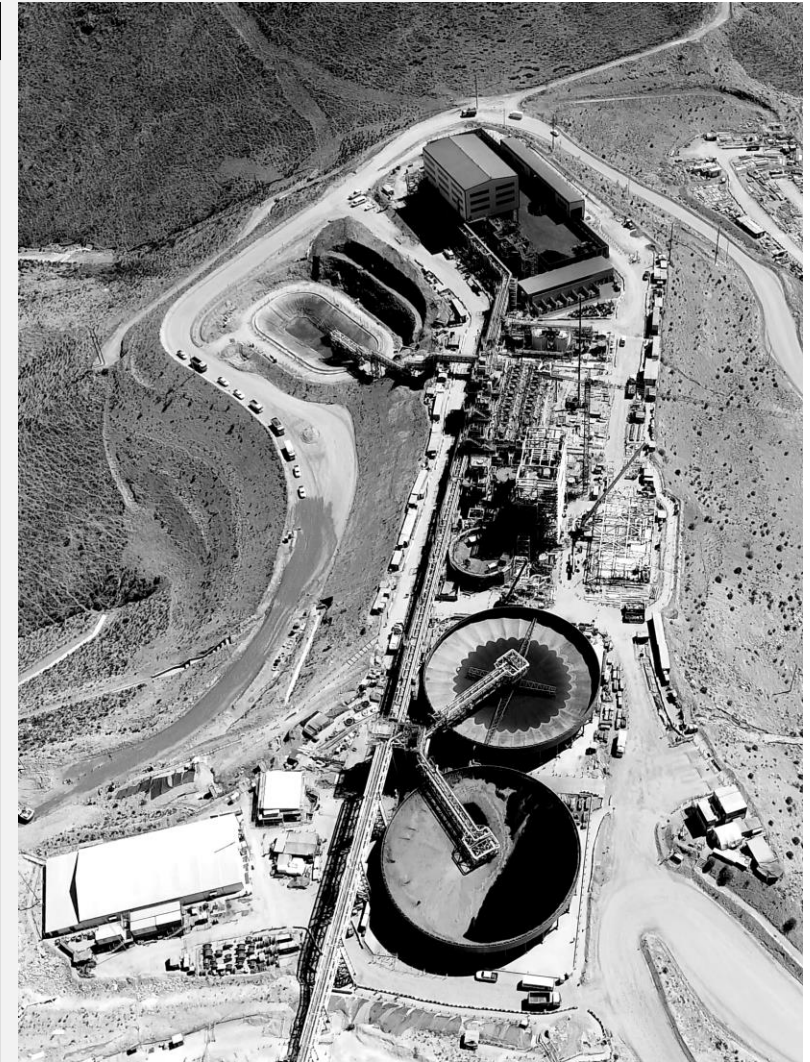
Technical Specialists

DESIGNING “BETTER” NOTIFICATIONS

... Receive ...

TARGETING NOTIFICATIONS

ID	Template
ApmStudentLearningPlanNotification	Notify Learner of Learning Plan changes
ApprovalProcessApprovalProgressed	Notify learner of progress in approval status
ApprovalProcessApprovalRequired	Notify approver of action required
ApprovalProcessApprovalWithdrawn	Notify Learner of withdrawn request
ApprovalProcessInitialRequest	Confirmation of Learner request submission
ApprovalProcessRequestApproved	Notify Learner of approved request
ApprovalProcessRequestDenied	Notify Learner of denied request
SystemEnrollmentNotification	System Registration Notification
ApmEmployeeEnrollmentDigest	Notify Supervisor of Registration status changes
ApmVlsAttendanceProcessing	APM VLS Attendance Processing Notification Email Template
VLE_ENROLLMENT	VLE Registration Notification Email Template
VLE_EVENT_CREATION	VLE Event Creation Notification Email Template
VLE_EVENT_DELETION	VLE Event Deletion Notification Email Template
VLE_EVENT_UPDATE	VLE Event Update Notification Email Template
VLE_EVENT_UPDATE_STUDENTS	VLE Event Update Learner Notification Email Template
VLE_UNENROLLMENT	VLE Unregistration Notification Email Template



THE CONTENT

“Content is king”

Simplification

Wording & Phrasing

Token Sets

Translations



THE LOOK

“You get one chance at a first impression”

Fonts

Banner Images

Whitespace

Tables

Light & Dark

Consistency



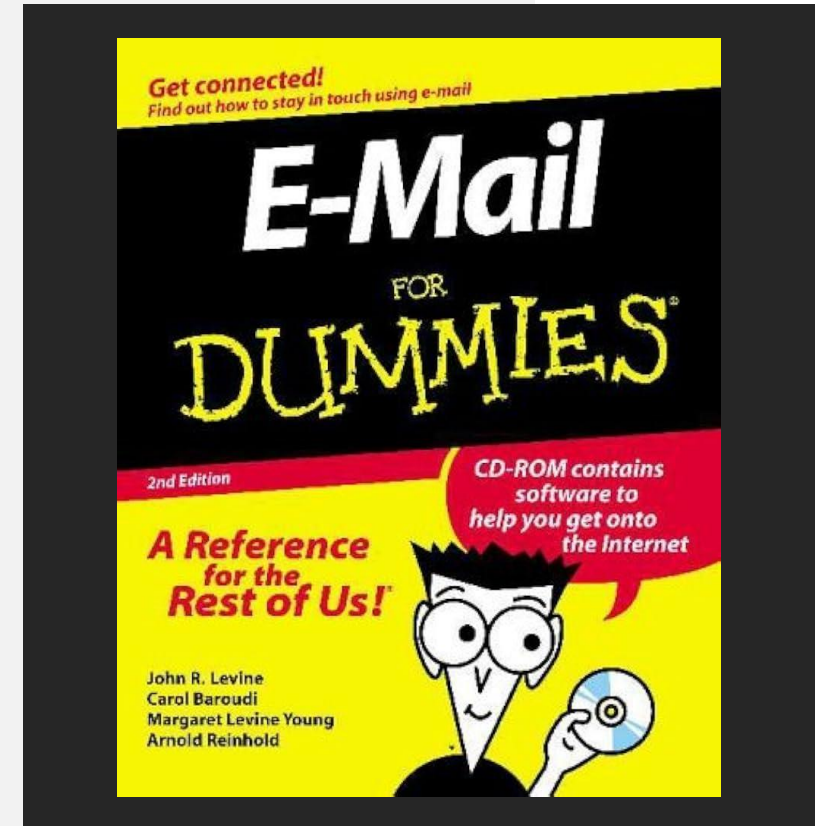
THE TECH

“To err is human, but to really foul things up you need a computer”

Responsive Design

Testing

Persistence



THE RESULT

... Reply.


SIZE AND FLOW

This resizing banner images and reflowing text is what helps on mobile apps too.

Learning Assignment Notification

noreply.GSSLearning@...com
To: Millard, Stephen

Sun 2024-01-21 23:11



Dear Stephen Millard

The following learning was added to your Learning Assignment(s). Please complete these prior to the listed due date.

Course Title	Due Date
Estrutura de Responsabilidade	17/04/2024 23:59:59 Europe/London

View your [Learning Plan](#) to see all courses assigned to you.

If you have any questions or need help, please contact us using the details below:

- users - [PSFLMSSupport@...com](#)
- All - [ServiceNow](#)


Happy Learning!

[Reply](#) [Forward](#)

Learning Assignment Notification

noreply.GSSLearning@...co
To: Millard, Stephen

Sun 2024-01-21 23:11



Dear Stephen Millard

The following learning was added to your Learning Assignment(s). Please complete these prior to the listed due date.

Course Title	Due Date
Estrutura de Responsabilidade	17/04/2024 23:59:59 Europe/London

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If you have any questions or need help, please contact us using the details below:

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- All - [ServiceNow](#)



Happy Learning!


[Reply](#) [Forward](#)

LIGHT VS DARK

We selected text colours that would not be overly stark when switching between modes.

Learning Assignment Notification

 noreply.GSSLearning@...com
To:  Millard, Stephen
Sun 2024-01-21 23:11





Dear Stephen Millard

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Learning Assignment Notification

 noreply.GSSLearning@...com
To:  Millard, Stephen
Sun 2024-01-21 23:11





Dear Stephen Millard

The following learning was added to your Learning Assignment(s). Please complete these prior to the listed due date.



Course Title	Due Date
Estrutura de Responsabilidade	17/04/2024 23:59:59 Europe/London

View your [Learning Plan](#) to see all courses assigned to you.

If you have any questions or need help, please contact us using the details below:

-  users - [PSFLMSSupport@...com](#)
- All  - [ServiceNow](#)

Happy Learning!

 Reply  Forward

THE RESPONSE

Did people like it?



BUILDING “BETTER” NOTIFICATIONS

... View Source ...

PEEKING BEHIND THE CURTAIN

Becoming a notification wizard

How To's

10 Tips

Additional Tools and Links Provided



USE THE NEWER NOTIFICATION TEMPLATING

Tick the box, launch the editor and save your changes when you're done.

Admin Centre ▾

Learning Administration

Menu Recents

notification X Q ↑ ↓

Manage User Learning

Send Email Notifications

System Administration

Manage Email

Email Notification Token Sets

Email Notification Templates

Automatic Processes

Exceeded Attachment Space Email Notification

Email Notification Templates

Add New | Help |

> Search > Search Results > Edit Messages

Template ID: ApmStudentLearningPlanNotification

Description: Notify Learner of Learning Plan changes

Summary

Messages

Attachments

Edit the Email Notification Template

Use Editor Content When Sending Email Notification: ☒

Launch Editor

Update the Message for the Email Notification Template

Tokens

Message ID	Message Description	Message	Remove
BODY	BODY	<pre><html> <body> <LOOP><label key="notification.ApmStudentLearningPlanNotification.MessageText1"/> <FIRST_NAME/>, <LAST_NAME/></LOOP> <LOOP></pre>	
SUBJECT	SUBJECT	<pre><label key="notification.ApmStudentLearningPlanNotification.Subject"/></pre>	

Edit Labels

Preview

View Default

Apply Changes

Reset

SUCCESSFACTORS
LEARNING

22

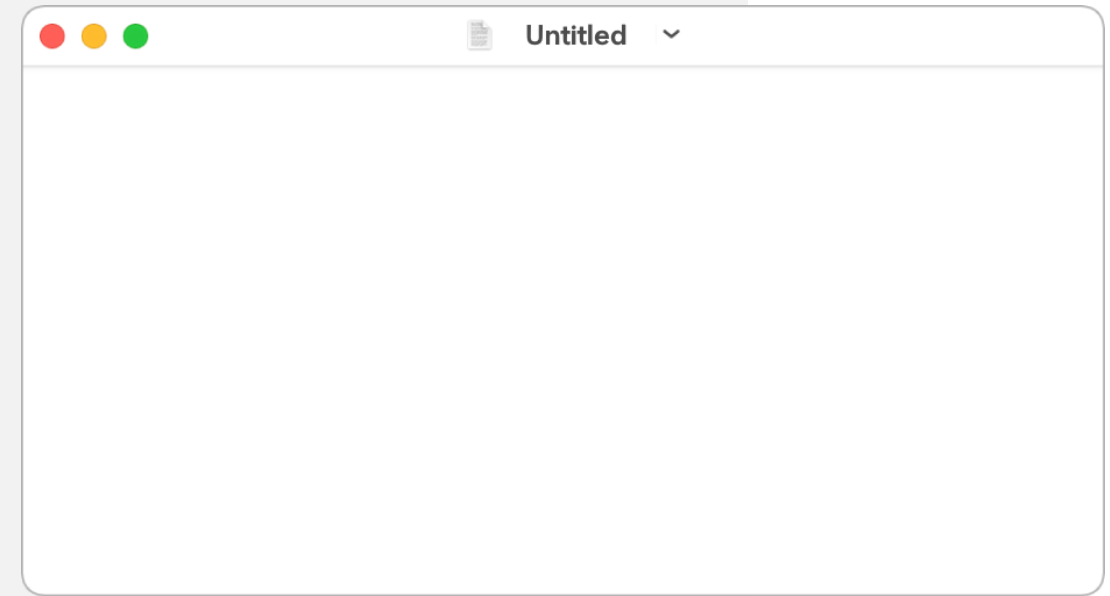
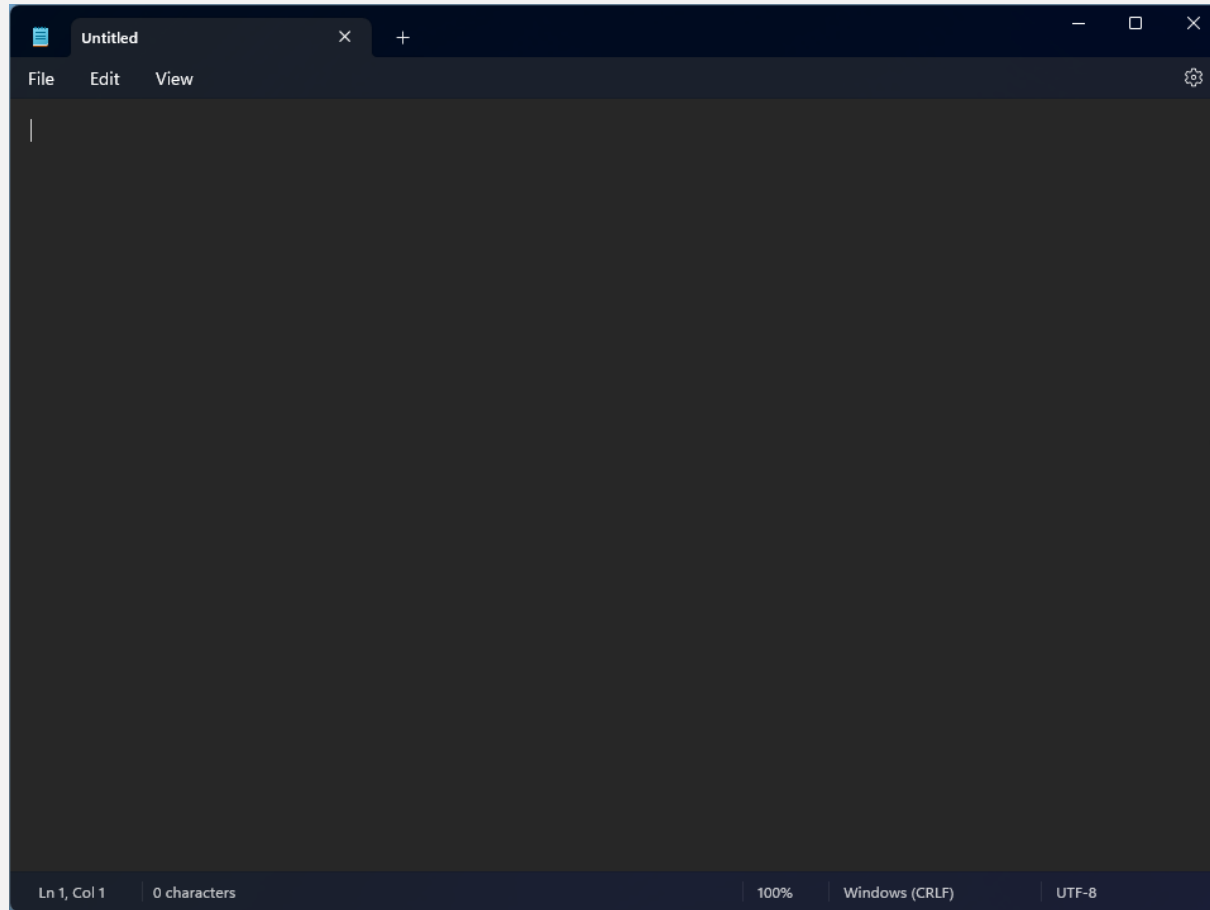
DON'T EDIT IN THE EDITOR...?!!

The editor will help us, but it is in some ways too helpful and so cannot be fully trusted.

The screenshot shows the 'Email Notification Template Editor' window. At the top, the 'Template Description' is 'Notify Learner of Learning Plan changes' and the 'Subject' is 'Learning Assignment Notification'. A red box highlights the 'English' language dropdown menu. Below the subject field is the 'Body' editor, which includes a rich text toolbar with a red box around the source code icon (<>). The body content area shows a placeholder image of a person at a desk. To the right of the body editor is a 'Tokens' list with a search bar. A red box highlights the entire 'Tokens' list, which contains the following items: 'Curriculum ID of the requirement added...', 'Curriculum ID of the requirement delete...', 'Curriculum ID of the requirement modifi...', 'Description of requirement type added t...', 'Description of the requirement added to...', 'Description of the requirement modified...', 'Due date of the program added to the u...', 'Due date of the program deleted from t...', 'Due date of the program modified in th...', 'Due date of the requirement added to t...', and 'First Name of the user'. At the bottom of the window, there is a footer with the text 'This template is customized for the locale' and four buttons: 'Remove', 'Send Preview', 'Cancel', and 'Save'.

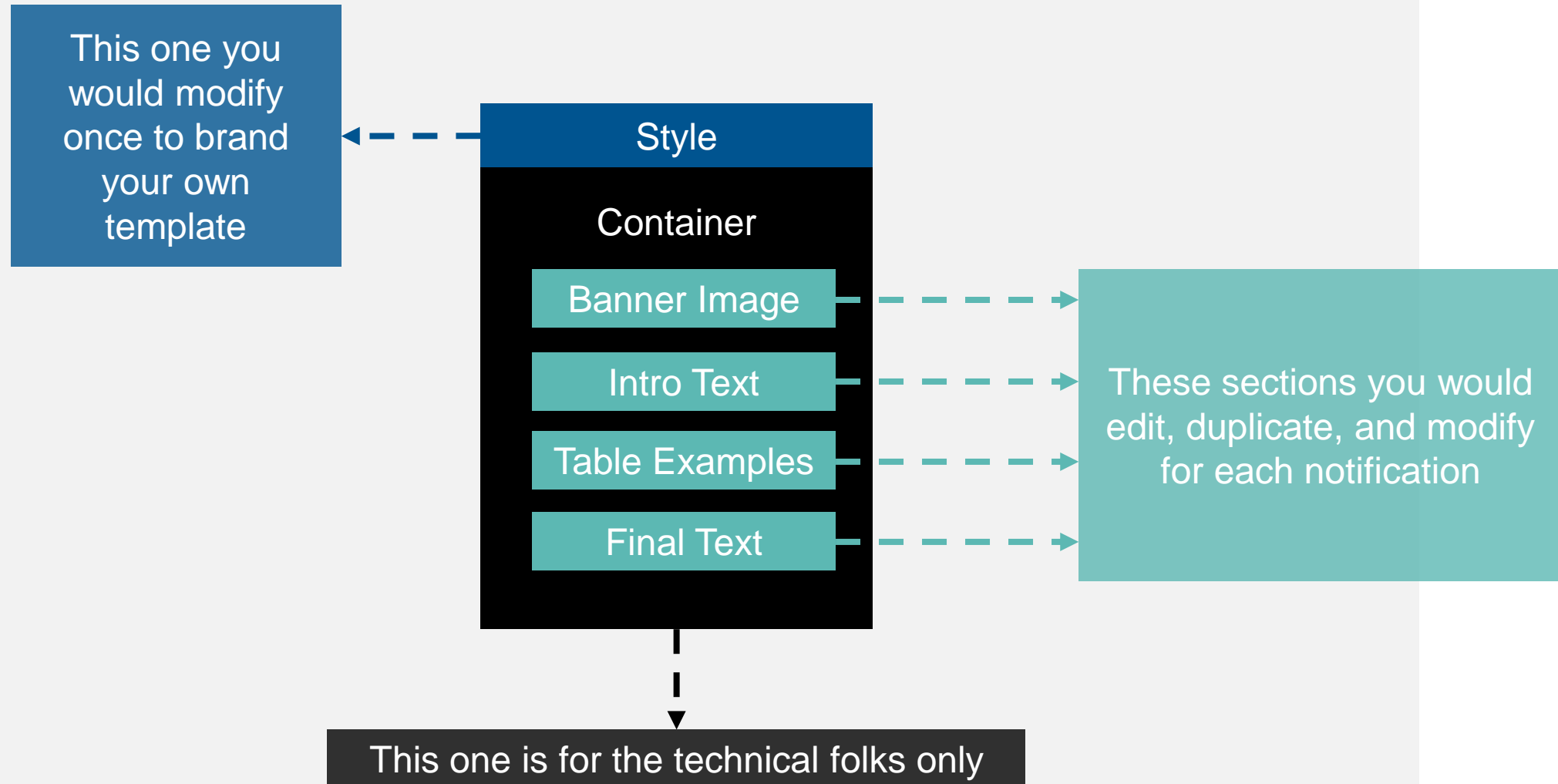
EDIT YOUR NOTIFICATIONS IN A TEXT EDITOR INSTEAD

Every computer comes with a basic text editor, but you can get better ones too.



QUICK START TEMPLATE STRUCTURE

Mostly you would change the content represented by the small boxes in the container.





Hi First Name of the user Last Name of the user

You have been assigned the following Learning Assignment(s). You will need to complete each of these before the listed due date.

This example table has two columns taking 75% and 25% of the width:

Course Title	Due Date
Title of the item added to the users learning plan	Item Due Date of the item added to the users learning plan

This example table has three columns taking 25%, 50%, and 25% of the width:

ID	Course Title	Due Date
Item ID of the item added to the users learning plan	Title of the item added to the users learning plan	Item Due Date of the item added to the users learning plan

This example table has three columns taking 33% of the width each:

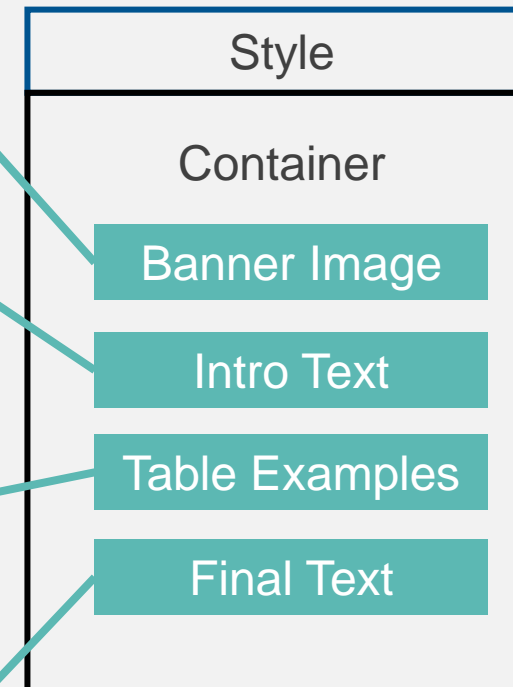
ID	Course Title	Due Date
Item ID of the item added to the users learning plan	Title of the item added to the users learning plan	Item Due Date of the item added to the users learning plan

If you have any questions or need help, please contact us via the [learning service desk](#) or by [emailing the learning services mailbox](#).

Here's to learning something new every day,

TEMPLATE PREVIEW

The template is intended to provide a starting point and some examples.





Hi Stephen Millard

You have been assigned the following Learning Assignment(s). You will need to complete each of these before the listed due date.

This example table has two columns taking 75% and 25% of the width:

Course Title	Due Date
First Aid for the Accident Prone	17/03/2024 23:59:59 Europe/London
Spreadsheets for Geeks	22/03/2024 23:59:59 Europe/London
Generating E-mail Notification Banner Images with DALL-E	01/04/2024 23:59:59 Europe/London

This example table has three columns taking 25%, 50%, and 25% of the width:

ID	Course Title	Due Date
COU-167854	First Aid for the Accident Prone	17/03/2024 23:59:59 Europe/London
COU-129640	Spreadsheets for Geeks	22/03/2024 23:59:59 Europe/London
COU-080996	Generating E-mail Notification Banner Images with DALL-E	01/04/2024 23:59:59 Europe/London

This example table has three columns taking 33% of the width each:

ID	Course Title	Due Date
COU-167854	First Aid for the Accident Prone	17/03/2024 23:59:59 Europe/London
COU-129640	Spreadsheets for Geeks	22/03/2024 23:59:59 Europe/London
COU-080996	Generating E-mail Notification Banner Images with DALL-E	01/04/2024 23:59:59 Europe/London

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POPULATED EXAMPLE

Here is how the template looks when it gets populated.



Hi First Name of the user Last Name of the user

You have been assigned the following Learning Assignment(s). You will need to complete each of these before the listed due date.

This example table has two columns taking 75% and 25% of the width:

Course Title	Due Date
Title of the item added to the users learning plan	Item Due Date of the item added to the users learning plan

This example table has three columns taking 25%, 50%, and 25% of the width:

ID	Course Title	Due Date
Item ID of the item added to the users learning plan	Title of the item added to the users learning plan	Item Due Date of the item added to the users learning plan

This example table has three columns taking 33% of the width each:

ID	Course Title	Due Date
Item ID of the item added to the users learning plan	Title of the item added to the users learning plan	Item Due Date of the item added to the users learning plan

If you have any questions or need help, please contact us via the [learning service desk](#) or by [emailing the learning services mailbox](#).

Here's to learning something new every day,

LOOKING AT ONE OF THE TEXT BLOCKS

Focus on the content you want to change and not the stuff around it.

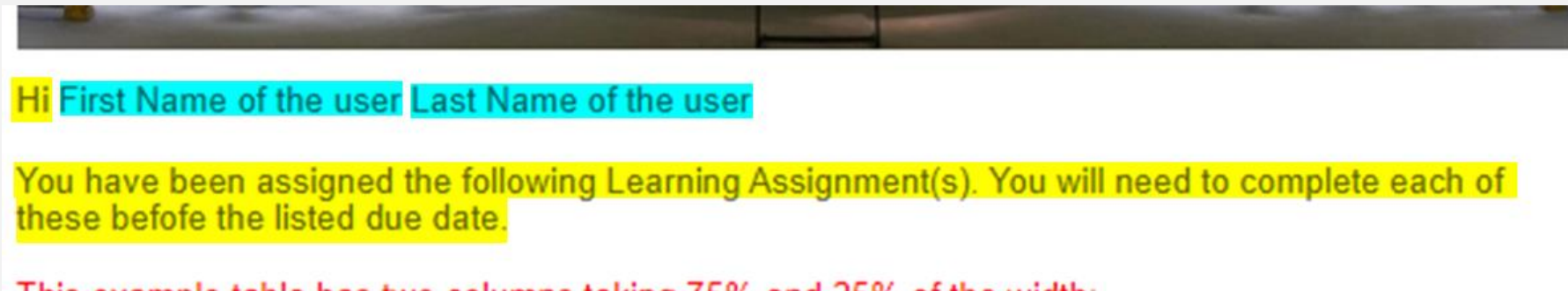
Spaces around Data Tokens

Simple Text

Data Token

```
<!-- That was the end of the banner image, so now we will add some introductory text for the reader -->
<p class="MsoNormal basetext basep">Hi <span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper"><span class="syntaxTagClass" data-tag="tag">First
Name of the user</span></span> <span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper"><span class="syntaxTagClass" data-tag="tag">Last Name of
the user</span> </span></p>
<p class="MsoNormal basetext basep">You have been assigned the following Learning Assignment(s). You will need to complete each of these before the listed due date.</
p>
<!-- The initial introductory information ends here -->
```

Lines with “<!-- -->” are comments to help you



LOOKING AT THE DATA TOKENS

Data tokens come with a lot of extra “stuff”, but you don’t actually need to know what it does.

Data Token

```
<!-- That was the end of the banner image, so now we will add some introductory text for the reader -->
<p class="MsoNormal basetext basep">Hi <span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper"><span class="syntaxTagClass" data-tag="tag">First
Name of the user</span></span> <span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper"><span class="syntaxTagClass" data-tag="tag">Last Name of
the user</span> </span></p>
<p class="MsoNormal basetext basep">You have been assigned the following Learning Assignment(s). You will need to complete each of these before the listed due date.</
p>
<!-- The initial introductory information ends here -->
```

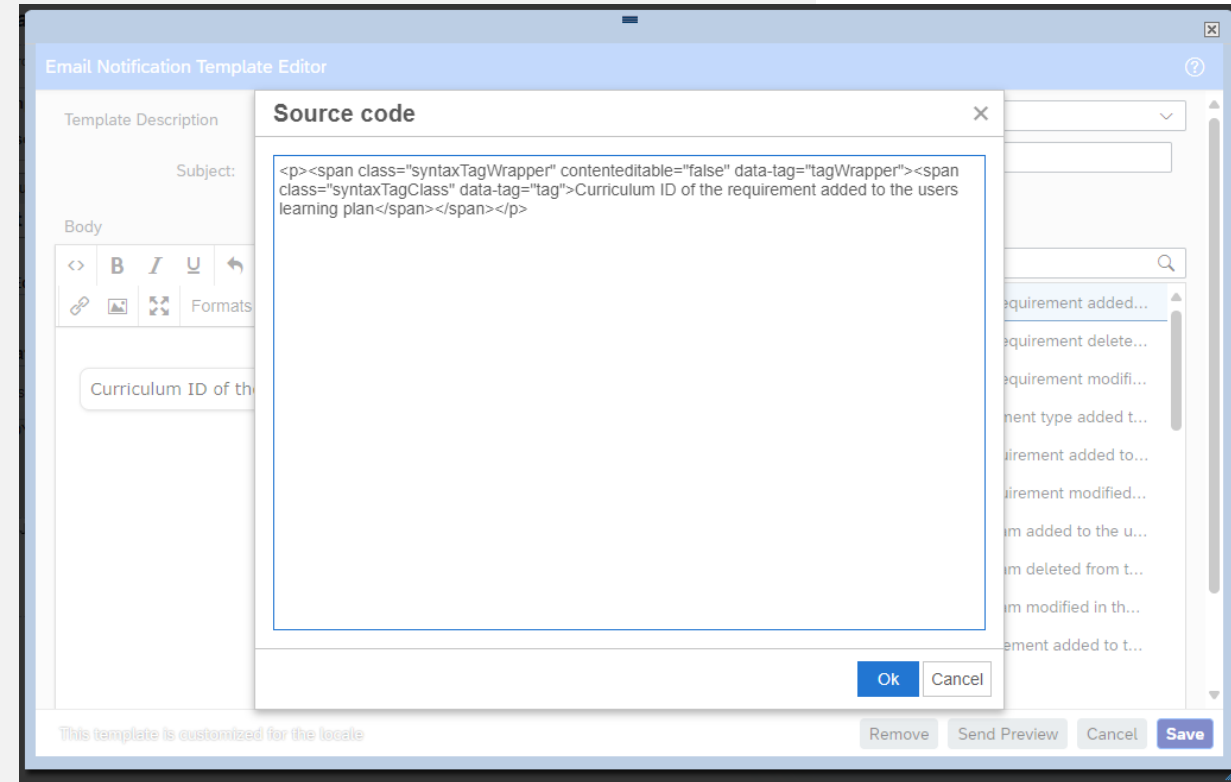
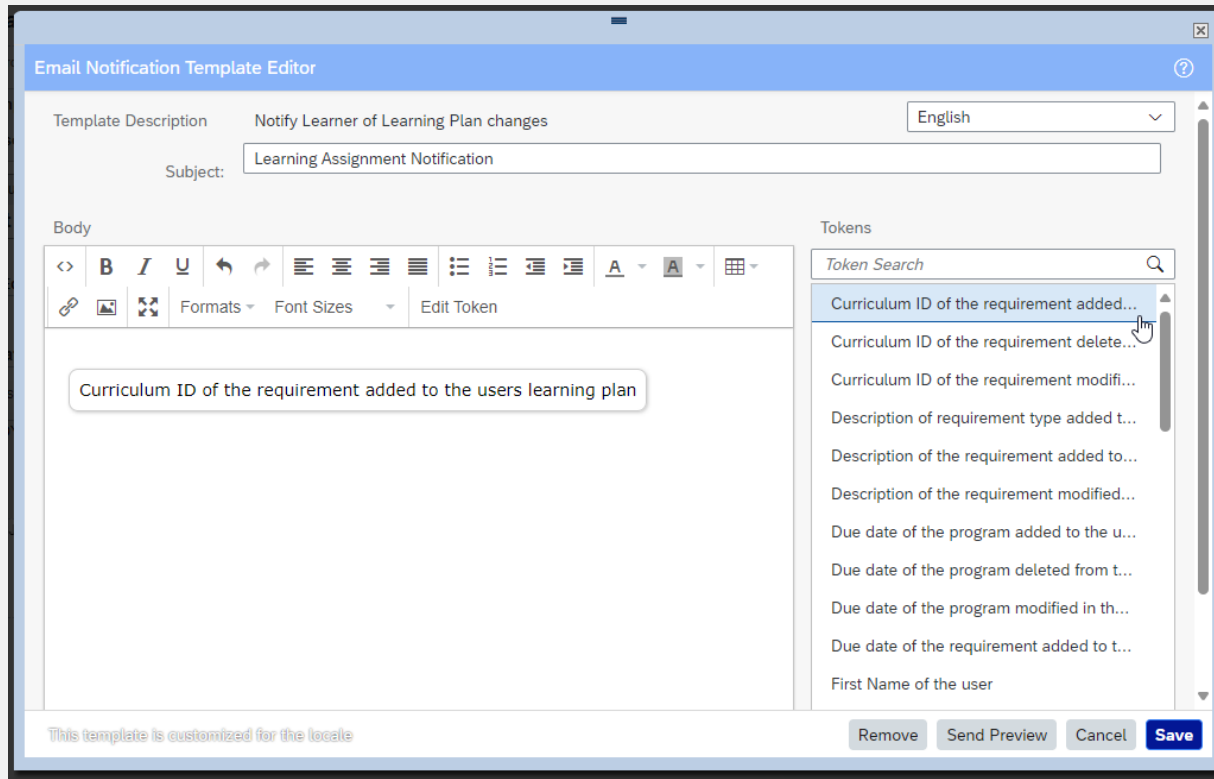
```
<!-- That was the end of the banner image, so now we will add some introductory text for the reader -->
<p class="MsoNormal basetext basep">Hi <span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper"><span class="syntaxTagClass" data-tag="tag">First
Name of the user</span></span> <span class="syntaxTagWrapper" contenteditable="false" data-tag="tagWrapper"><span class="syntaxTagClass" data-tag="tag">Last Name of
the user</span> </span></p>
<p class="MsoNormal basetext basep">You have been assigned the following Learning Assignment(s). You will need to complete each of these before the listed due date.</
p>
<!-- The initial introductory information ends here -->
```

Data Tokens are wrapped in common pairs of span blocks (tags)

GETTING A DATA TOKEN

Just copy the information from the system notification editor.

1. Temporarily delete everything in the editor.
2. Insert the data token by selecting it on the right – it appears on the left



3. Switch to Source Mode by selecting "<>".
4. Copy the code of the token to paste into your text editor **removing the <p> and </p>***.

* These make it a whole paragraph on its own, and you will be pasting into your own paragraph so remove them.

TABLES

The template contains three tables to show you some different column sizes.

`<tr>...</tr>` = table row | `<td>...</td>` = table data (cell)

```
<!-- This example table has two columns taking 75% and 25% of the width -->
<p class="MsoNormal basetext basep" style="color: red;">This example table has two columns taking 75% and 25% of the width:</p>
<table class="tableinfo" border="1">
  <tbody>
    <!-- This creates some headings for the table -->
    <tr>
      <td class="tableinfoheadercell-75">Course Title</td>
      <td class="tableinfoheadercell-25">Due Date</td>
    </tr>
    <!-- This is the end of the heading row definition -->
    <!-- This loop puts an item on each row -->
    <LOOP>
      <tr class="loopedRow" title="This section is contained inside a loop tag.">
        <td class="tableinfobodycell-75"><span class="syntaxTagClass" data-tag="tag">Title of the item added to the users learning plan</span></td>
        <td class="tableinfobodycell-25"><span class="syntaxTagClass" data-tag="tag">Item Due Date of the item added to the users learning plan</span></td>
      </tr>
    </LOOP>
    <!-- This is the end of the loop and the closing of the table -->
  </tbody>
</table>
```

A special SuccessFactors Learning notification tag that allows the output of multiple sets of items*

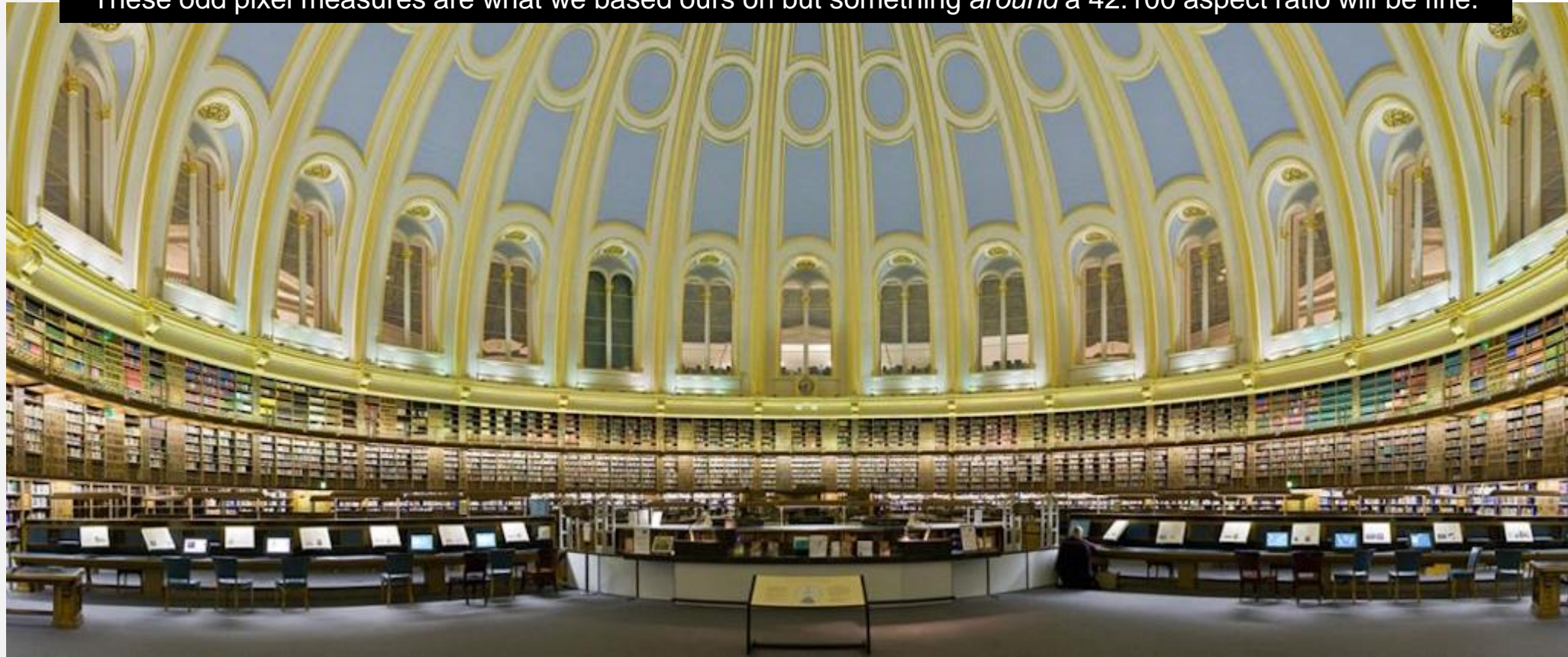
* Note that the `<tr>` here has a special class this has to be there for this to work – you can find it in the SAP documentation.

PREPARING A BANNER IMAGE

The template works best with a pre-cropped image.

These odd pixel measures are what we based ours on but something *around* a 42:100 aspect ratio will be fine.

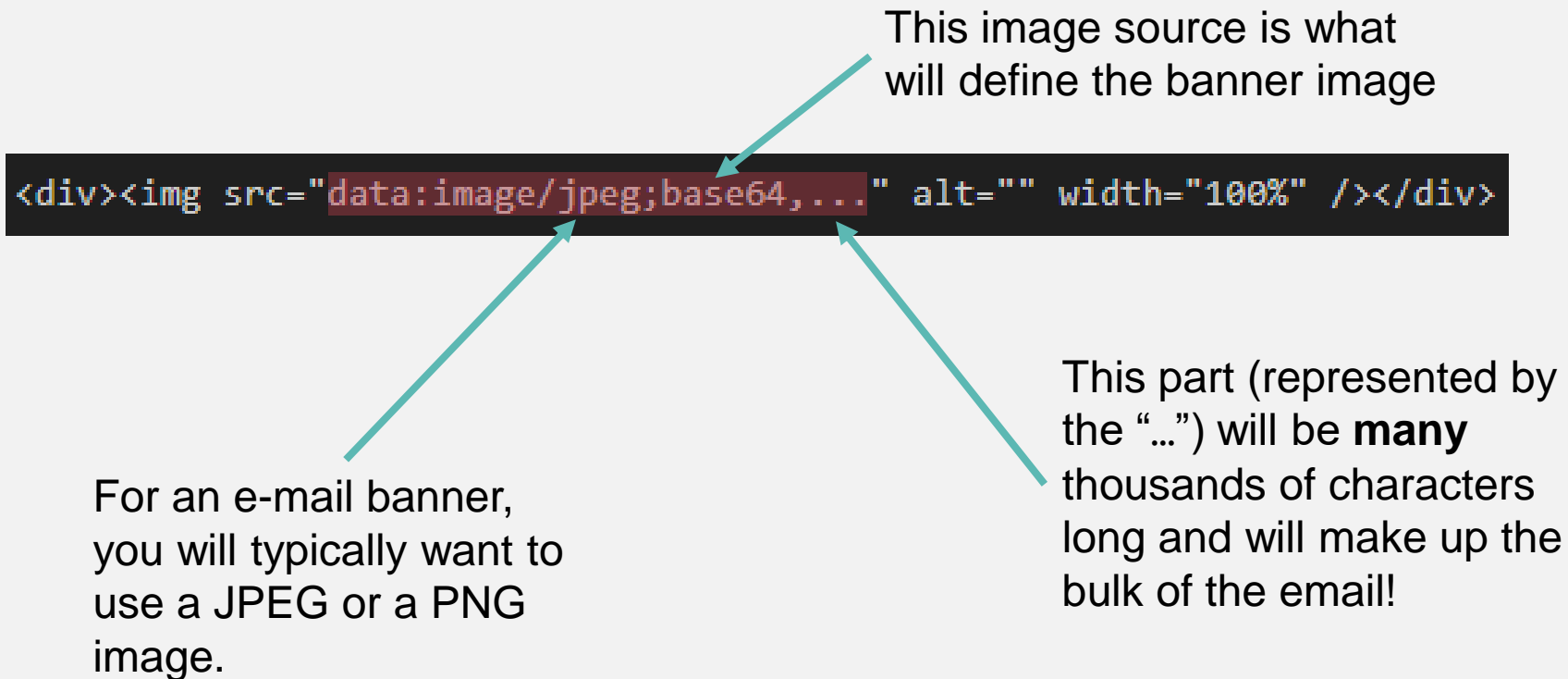
428
pixels



1,023 pixels

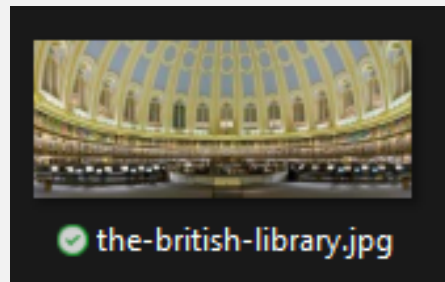
EMBEDDING THE BANNER IMAGE

Embedding images as text.

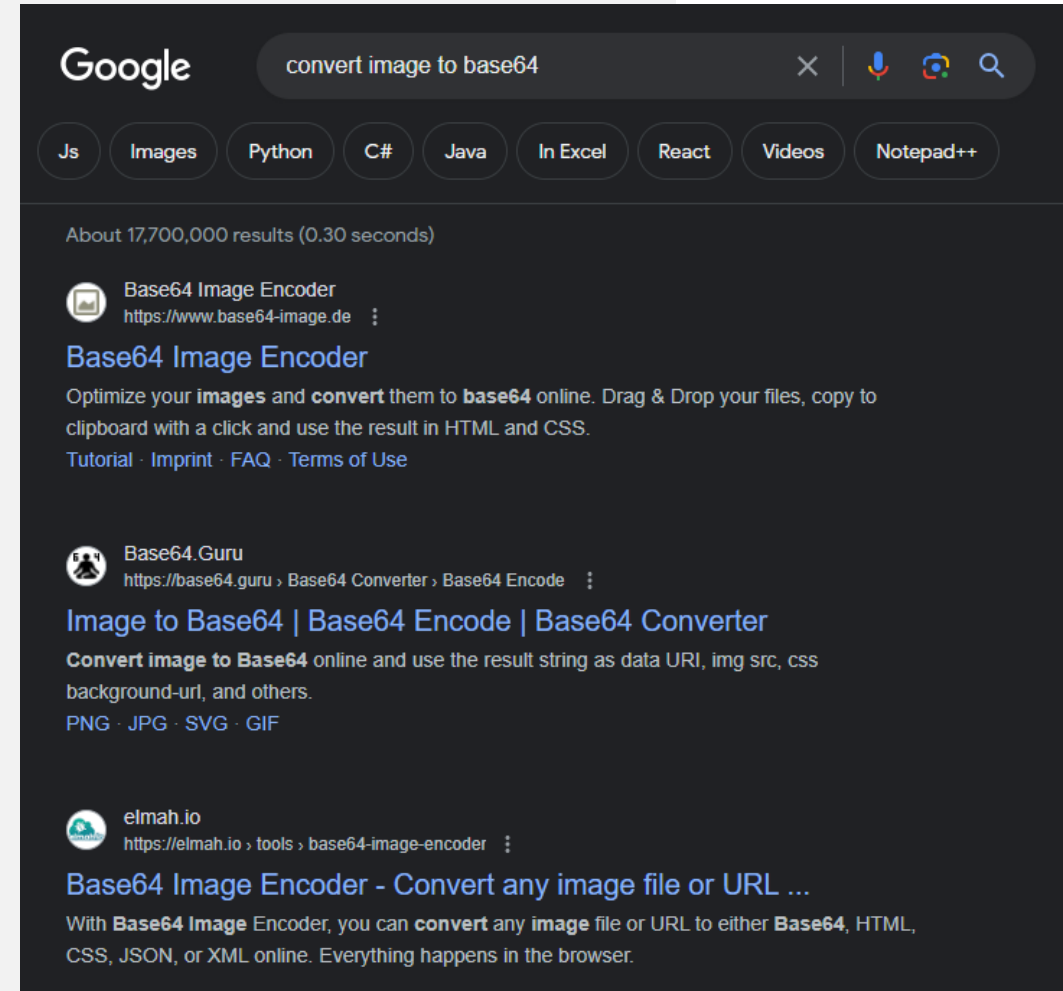


CONVERTING THE BANNER IMAGE TO TEXT

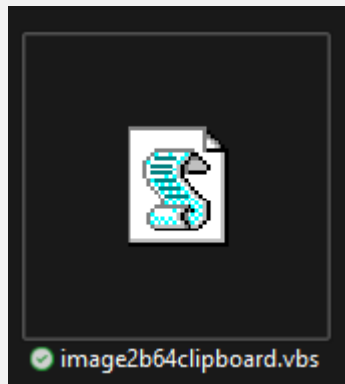
“Convert image to base64”



Upload to an online converter



Drag & drop onto script file
(Windows only)



Mac Command Line: `openssl base64 < path/to/file.png | tr -d '\n' | pbcopy`

TRANSFER THE UPDATED TEMPLATE TO THE SYSTEM

Just don't forget to actually put it in the system!

Switch the SuccessFactors Learning notification editor to Source Mode

Copy the online editor content to a backup file if you don't have a copy

Delete the content in the online editor

Copy the content from the offline text editor

Paste the content into the online editor

OK the content to return to the online editor rich-text mode

Save the content in the online editor

What notifications do you actually use?

What notifications get generated most?

Do any notifications generate lots of support queries that a change in the content or layout could fix?

1 Scope

Prioritise your notification updates in manageable stages.

You can typically fit more content in your editor on the screen

You can get larger preview using your web browser

It is often quicker to (re)open a file than login and find the template in the system

Feature-rich text editors can help with your content creation through highlighting the HTML syntax in different colours, suggesting tags, spell checking, integrating with AI services to help you reword content.

Multiple offline copies that can be shared with colleague – e.g. web developers.

2

Edit Offline

The notifications editor is a poor choice of editor for more involved changes.

The template being shared hopefully provides a good workable starting point

Your final template is also a starting point, and you may find you need to tweak things for particular notifications.

If one notification is similar to another, use that prior notification as your starting point rather than the base template.

if you change the base template, do try and change all of the notifications that can trace their history to it. Your future self or a colleague will thank you.

3

Use Templates

Establish your own template to build your notifications on.

Identify the template

Template ID

Identify the language

Language ISO codes work well

Identify the iteration

Version number or date stamp

Examples

- 2024-03-14 ApmStudentLearningPlanNotification EN.html
- EN ApmStudentLearningPlanNotification v001.html
- 001.EN.ApmStudentLearningPlanNotification.html

4 File Names and Backups

A good naming convention will help you keep track of your files if you need to revert to them.

Take backups of whatever you are starting with in your test and production systems

Take backups whenever you do any notable change – multiple times an hour is not unreasonable if you are making lots of changes.

5

Seriously, back them up!

Oh no. I took too many backups ...
... said no one, ever.



Browser

First, test your e-mail source in your browser.

**Admin UI
Editor**

Copy it into the editor in SuccessFactors Learning's admin UI in your test instance and check it looks reasonable.

**Send
Email**

Send a preview e-mail and see how it looks in your e-mail client apps.

**Trigger
Notification**

Finally, set up any necessary data and trigger the notification from your test instance and check how the e-mail looks when populated.

6 Testing

Testing is a multi-stage, multi app process.

Make sure things line up

Do a spelling and grammar check

Make sure your images are appropriate and representative for your organisation, colleagues, etc.

Use exactly the same approach to spacing, borders, fonts, use of bolding, colours, etc. across all of your notification templates

#7

Sweat the small stuff

Imagine how many times the notification will get read. Isn't it worth perfecting?

Text can blur for sighted readers as the image resizes.

For colleagues with a sight or reading impairment, their screen reading tools typically won't cope with that and have to rely on something called "ALT" text.

It is tedious to maintain versus putting the text in the e-mail.

8

Text is text

Images are not

We know it is tempting, but please, don't.

Try to work in one language to begin with if you can and get that signed off before doing any translations

Doing them in parallel *can* save time in testing, but if you have issues and tweaks that require iterative builds and waiting on further translation revisions, you will be massively slowed down overall.

9 Translations

Get everything else right before you translate

REMEMBER: Keep it Simple

10 Experiment

You took a backup, and you have a test system, a template, and some top tips...

ADDITIONAL RESOURCES

SAP Documentation

- [Managing Learning Notification Templates](#)

SAP KBA

- [2330530](#) - SAP SuccessFactors Learning Notifications Knowledge, Support & Tips
- [2835918](#) - Notification VCAL Customization in SuccessFactors Learning

Blog

- [Branding your LMS email notifications quickly & easily](#)
- [Dressing up your VCAL in LMS](#)

Images

- [Paint.Net](#) – Image editor
- [Base64 Image Encoder](#) – Online encoder
- [Pexels](#) – Royalty free images

Formatting

- [‘Learn HTML in 1 Hour’](#) – structuring content
- [‘Learn CSS in 1 Hour’](#) – styling content

THANK YOU

