

**Using Salesforce1
Responsive eLearning Course
Complete Evaluation Proposal**



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Executive Summary

Salesforce University, the training and certification arm of salesforce.com, provides training to both to employees and customers of salesforce.com (salesforce.com). The team has recently taken up the challenge of delivering elearning courses that utilize responsive design techniques and are optimized for viewing on mobile devices of multiple sizes.

One of the first courses to use these techniques will be a new version of the Using Salesforce1 course.

Goals

The overall goal/objective of the course is:

The learner will be able to navigate, create, and modify records in Salesforce using the Salesforce1 mobile application on their mobile device.

This course and the corresponding evaluation plan hopes to achieve these business goals:

- Increase the level of acceptance and use of the Salesforce1 mobile application
- Determine the effectiveness of responsively-designed elearning courses:

Evaluation Plan

To evaluate the level at which the course achieves the business goals mentioned above an extensive evaluation program is planned. This program is designed around the 4-Level evaluation methods proposed by Kirkpatrick. These levels are Reaction, Learning, Behavior, and Results (Kirkpatrick & Kirkpatrick, 2008, p. 21). Looking at each of these levels both individually and collectively will provide a complete picture of the course's impact and effect.

The planned evaluation tools are:

- A course satisfaction survey delivered at the completion of the course (see Appendix B: Student Reaction/Satisfaction Survey)
- A series of quizzes delivered during the course (see Appendix C: Course Quiz Questions)
- A post-course focus group 1 to 3 months after completion of the course (see Appendix D:)

The course is planned to be released before the next release of salesforce.com software (salesforce.com, 2014). This evaluation will take place over two software release cycles (approximately 8 months). The task, timeline, and people involved are detailed in Appendix A: Timeline and Task Breakdown.

Key Findings and Recommendations

Using the specified evaluation tools, the team involved will determine the customer satisfaction level of the course, the average score on the quiz, the percentage of people viewing the course on a mobile device, and the increase in Salesforce1 usage among those you viewed the course. The CSAT score will be compared to the company standard of 3.8. The average quiz score will be compared against the company standard of 75% passing. This data will be calculated at the end of each release cycle.

A focus group will be organized for students who provided their email address in the course satisfaction survey and who view the course during the last release cycle (4 months). This focus group will be conducted by the training developer or evaluation developer (depending on availability) using the standard online meeting software that salesforce.com uses.

Based on the data gathered and calculated over the next two release cycles, a report will be generated by the training developer and evaluation developer for the training manager. This report will detail the results of the evaluation and specifically answer if the responsive design techniques meet or exceed both the level of learning and customer satisfaction rates of normal elearning courses and if the students increased their usage of the Salesforce1 app after completing the course. An overall satisfaction score of at least 3.8, along with an average passing score of 70% or higher, and an increased app usage of at least 25% will be considered a success.

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Using Salesforce1 eLearning Course

Salesforce University, the training and certification arm of salesforce.com, provides training to both to employees and customers of salesforce.com (salesforce.com). The team has recently taken up the challenge of delivering elearning courses that utilize responsive design techniques and are optimized for viewing on mobile devices of multiple sizes.

One of the first courses to use these techniques is the Using Salesforce1 course. The first version of this course is currently available for customers. A second revision is currently in development. This second version will be designed use responsive design techniques and be created using Adobe Captivate 8.

Goals/Objectives of Course

The overall goal/objective of the course is:

The learner will be able to navigate, create, and modify records in Salesforce using the Salesforce1 mobile application on their mobile device.

Additionally, this course is also being developed to help achieve these business goals:

- Increase the level of acceptance and use of the Salesforce1 mobile application
- Determine the effectiveness of responsively-designed elearning courses:
 - Do students learn as effectively as in a normal course?
 - Are students as satisfied as with a normal course?

Course Audience

This course is designed for users of the Salesforce1 mobile application (salesforce.com). This application allows salesforce.com users to access records and chatter feeds on their mobile devices. The most common end users of Salesforce are Sales and Service Representatives, so the course focuses on those types of users.

To help focus the course these additional assumptions will also be made about the audience:

- Student can successfully use Salesforce in a non-mobile web browser to find, edit, and create records.
- Student can successfully purchase and install an application on their mobile device.
- Student uses a mobile device on a daily basis to fulfill work duties.
- Student uses either an iOS or Android based mobile device (these are the only operating system currently supported by the application).
- Student is focused on helping customers find and purchase solutions in a quick and timely manner. They believe working via their mobile device will help with this.

Course Structure

This course is made up of five modules/topics. These topics are:

- **Using Chatter:** Details how to access, sort, view, and post to a users Chatter feed. It also details how to access and search for a specific Chatter group.
- **Creating Records:** Details how to create a new record using either the new button on the object list view screen or action on the chatter or record screen.
- **Searching for Records:** Details how to search for a record using both the Search field in the

navigation menu and the object-specific search field on the object list view screen.

- **Modifying Records:** Details how to edit or delete a record using the Edit or Delete button. It also covers using update actions, if available.
- **Using Today:** Details how to setup and use the Today feature to view the user's calendars and local weather.

This course and all topics are accessed from a single link to make the course easy to access via a mobile device. The topics in the course can be viewed in any order. Each topic contains a brief description of the topic followed by a video demonstration of how to do the tasks in the topic. Note: The conclusion of the course will not be shown to the student until they have viewed all five topics.

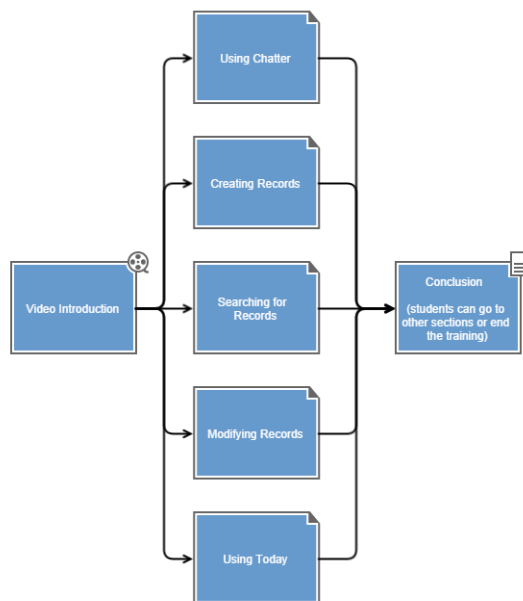


Figure 1: Course Structure

This course is only accessible from the Help and Training portion of the salesforce.com Success Community and is available to all salesforce.com users.

Evaluation Recommendations

Based on the planned structure and the business goals of the course, evaluating this course should utilize all four levels of the Kirkpatrick 4-Level method of training evaluations.

- Level 1 guidelines provide a way to collect data and analyze the satisfaction level of students (Kirkpatrick & Kirkpatrick, p. 28).
- Level 2 guidelines provide methods to determine the level of learning that occurred.
- Level 3 guidelines provide methods to determine and collect data about behavior changes related to attending the course.
- Level 4 guidelines provide methods to determine results and return on investment of the course.

Data collected based on these guidelines should provide the needed data to help answer these questions from the business goals:

- Do students learn as effectively as in a normal course?

- Are students as satisfied as with a normal course?
- After taking the course do students use the Salesforce1 mobile app more?

To gather the needed data three evaluations tools will be used:

- Student survey to gather student satisfaction data at the end of the course.
- Course topic quizzes to measure student knowledge.
- Virtual focus group, including a post course survey, for students that have taken the course during the last release cycle (last 4 months).

Student Survey: Student Satisfaction and Results Data

A survey should be linked to the end of the course to gather data on the student reaction and level of satisfaction. This survey should be delivered using the standard online survey tool so that the data can be stored and calculated using the database and reporting capabilities of Salesforce. Additionally, the survey should automatically launch when a student completes to achieve as close to 100% response rate Kirkpatrick recommends (2008, p. 52) as possible. A high response rate helps to get a broad view of the student's reaction and avoid any biases that might be seen in a small response rate.

Since the audience for this course is a mobile user who is likely to be viewing the course on their mobile device, the survey needs to be short as to take up as little bandwidth as possible and simple to fill out on a small screen. With this in mind, the survey is only two pages and has a total of only 7 questions.

This survey was developed by the evaluation developer. The complete list of survey questions is included in Appendix B: Student Reaction/Satisfaction Survey.

Topic Quizzes: Student Learning Data

Short quizzes should be included at the end of each topic after the video demonstrations. These topic quizzes should be between 1 to 2 questions for each topic and be delivered using the quiz capabilities of Adobe Captivate. The students should receive immediate feedback as to the correctness of their answers and receive an overall score at the conclusion of the course.

The quiz questions were developed by the course's training developer and are listed in Appendix C: Course Quiz Questions.

Virtual Focus Group: Student Behavior and Results Data

After the course has been available for 4 months (one salesforce.com release cycle) the students that provided their contact information on the Student Survey will be contacted and invited to attend a virtual focus group. This focus group will be done via an online meeting using the standard Salesforce online meeting tool. Since salesforce.com customers are located around the world, an in-person focus group is not practical. This focus group may need to be held multiple times to accommodate all interested students.

Those attending the focus group will first answer a short survey on their current and perceived increase in usage of Salesforce1. Then the facilitator of the focus group will ask the participants a couple of questions to begin the discussion. The focus group session will also be recorded using the online meeting tool to allow for the evaluation developer and training developer to review the student's comments. Due to the vast potential locations of the participants the focus group should be no longer than an hour. The survey and focus group questions are listed in Appendix D: Focus Group

Questions. The survey and questions were developed by the Evaluation Developer. The focus group will be facilitated by either the Evaluation Developer or the Training Developer depending on schedule and availability. The focus group will be repeated for two release cycles.

Data Calculating and Reporting

Based on the data gathered from the evaluation tools, a report will be generated by the training developer and evaluation developer detailing the results of the evaluation and specifically answering the questions brought up by the business goals of the course. The report will be broken up into four parts: student satisfaction results, student learning results, student behavior changes, and overall results.

This report will be provided to the training manager a month after the second release cycle is completed (approximately 9 months after the course is released). After the report is reviewed by the training manager, it should be presented to the larger training group along with any additional comments from the training manager. Based on the report findings it should be determined by the training manager if additional response design projects should be developed.

Student Satisfaction Results

Student satisfaction results will be determined using the Student survey that is completed at the end of the course. Question 3 “What was your overall level of satisfaction with this course?” is included in all elearning course surveys used at salesforce.com. The average rate score for this question is calculated by the survey tool and then compiled at the end of each release cycle for all courses by the training coordinator. The course’s average rate score for the previous 2 releases will be added to the report. A score of 3.8 (the salesforce.com standard acceptable score) or higher for both releases will be considered a success.

Additionally, the average rate score will be calculated by the survey tool for each of the statements listed in Question 1 “Rate whether you agree or disagree with these statements”. These rate scores will also be compiled by the training coordinator at the end of each release cycle and provided to the training developer and evaluation developer. These scores will be included in the evaluation report. A score of 3.8 or higher on each of these areas will be considered a success.

The answers for Questions 2, 4, and 5 of the survey will not be included in the evaluation report as they are designed to assist the training developer with maintenance of the course. The other questions on the survey will be used with other results.

Student Learning Results

The topic quizzes will be used to calculate the level of learning of the students. The overall passing score and the average score for each question will be captured and calculated by the learning management system. A report containing these calculations will be provided by the training coordinator at the end of each release cycle to the course developer and evaluation developer. An overall passing score of at least 70% will be considered a success. This data will be included in the evaluation report to determine if students learn as well from a responsive course as they do from a standard elearning course. Additionally, this data will also serve as a way of evaluating both the questions and the content of the course and will be used by the training developer to make changes to the course.

Student Behavior Change

The virtual focus group (along with a question from the student survey) will be used to determine the change in behavior of the students, specifically if they are using Salesforce1 more. The answers to the short survey that students take will be the primary metric. An average increase usage of 25% will be considered a success. The average increase usage scores will be provided in the training report, along with any comments or feedback that the participants provide.

Please note, the behavior of the students can be affected by many factors outside the control of the salesforce.com including the student's employer's use of salesforce.com, the student's employer's acceptance of mobile devices, the student's mobile device, and the knowledge the student has on how to use their mobile device. To help understand these factors the answers to Questions 6 "How did you view this course?" and 7 "Are you using Salesforce1 on a mobile device? If so, which type of device?" will also be included in the report. This information will help determine if students have mobile devices that their employer allows them to access Salesforce on (please note the training catalog can only be accessed via Salesforce).

Overall Results

The results of this evaluation need to address the business objectives associated with this course, namely:

- Increase the level of acceptance and use of the Salesforce1 mobile application
- Determine the effectiveness of responsively-designed elearning courses:
 - Do students learn as effectively as in a normal course?
 - Are students as satisfied as with a normal course?

If the increase usage of Salesforce1 determined by the virtual focus group is greater than 25%, it can be assumed that the course has met the goal of increasing use and acceptance of the app.

If the average satisfaction rate is 3.8 or higher for all factors during both release cycles then the responsively-designed elearning course can be said to match the effectiveness of the normal elearning course.

Return on investment for this course is difficult to determine. Since this course is going to be accessible to all Salesforce users for no additional charge, there is no direct revenue associated with the course. Additionally, since Salesforce1 is available to all Salesforce users, there is no direct revenue associated with an increase in Salesforce1 usage. There could potentially be some time savings by individual students when using Salesforce1 to access their records instead of waiting to access them from the laptops, but due to the fact that Salesforce is used in many industries by people with a large number of different roles this time savings is very difficult calculate.

There is one factor that can be used to calculate return on investment, that is the percentage of people accessing the course from a mobile device. This metric is captured in question 6. "How did you view this course?" of the Student Survey. If the combined percentage of those people who viewed the course from their phone or tablet is equal or greater to the percentage of people who viewed the course from their laptop or desktop computer then there is evidence that the additional time and money to make the course using responsive design has increased the students access to the training materials and therefore the business goals of the course have been met.

Additionally, if the business goals of this course are met, there are intangible benefits to the

SalesforceU team. These come in the form of good will and perception of the brand. If there are equal or greater numbers of students watching the training on their mobile devices they will have a great sense that SalesforceU is concerned about their students and wants to make training as easy to access as possible. Additionally, by being able to show a successful development and rollout of a responsively-designed course that meets both the student satisfaction and student learning standard of SalesforceU, the team can show their level of innovation both inside and outside salesforce.com and thus increase the perception of the SalesforceU brand.

References

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Appendix A: Timeline and Task Breakdown

The people involved in developing, deploying, and evaluating this training program are:

- Training Developer
- Evaluation Developer
- Training Coordinator



The timeline for this training program and its evaluation are detailed in the tables below. Please note, the tasks are color coded based on the list above.

Table 1: Course Development Timeline

Task	Workweeks								
	1	2	3	4	5	6	7	8	9
Define objectives and audience	Orange	Orange							
Develop course assessments			Orange						
Develop course outline and structure			Orange	Orange					
Develop satisfaction survey					Teal	Teal			
Develop course materials					Orange	Orange	Orange		
Test course								Orange	
Test satisfaction survey								Teal	
Deploy course									Purple

Table 2: Post Release Evaluation

Tasks	Release 1				Release 2				Release 3
	Month 1	Month 2	Month 3	Month 4	Month 1	Month 2	Month 3	Month 4	Month 1
Student Satisfaction Data Collection	Done by Survey Tool								
Student Learning Data Collection	Done by LMS								
Overall Satisfaction Data Report				Purple				Purple	
Course Satisfaction Data Reviewed					Orange				Orange
Virtual Focus Group(s)					Teal				Teal
Course Evaluation Report					Teal				Teal

Though the focus of this evaluation is for the first two releases after the course is released, the course should continue to be evaluated using the standard salesforce.com evaluation process as detailed below.

Table 3: Ongoing Evaluation

Tasks	Release				Release	
	Month 4	Month 1	Month 2	Month 3	Month 4	Month 1
Student Satisfaction Data Collection	Done by Survey Tool					
Student Learning Data Collection	Done by LMS					
Overall Satisfaction Data Report	Purple				Purple	
Course Satisfaction Data Reviewed		Teal				Teal

Appendix B: Student Reaction/Satisfaction Survey

This form is to be delivered to students via the standard online survey tool. The look at feel of the survey should match the salesforce.com standards.

Page 1 of the Survey

1. Rate whether you agree or disagree with these statements

	Disagree		Neutral		Agree
The course content was what I expected	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The course was interesting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The course was easy to navigate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What I learned in this course helps me do my job	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I can now use the Salesforce1 mobile application	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I would recommend this course to my coworkers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. Select the topics you found most useful in the course:

- Using Chatter
- Creating Records
- Searching for Records
- Modifying Records
- Using Today

3. What was your overall level of satisfaction with this course? (1-unsatisfied, 5-completely satisfied)

1	2	3	4	5
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

4. Are there any topics not covered in the course that you would like to know about?

5. Do you have any additional feedback you would like to share?

Page 2 of the Survey

6. How did you view this course?

- On my phone
- On my tablet
- On my computer/laptop

7. Are you using Salesforce1 on a mobile device? If so, which type of device?

- I'm using Salesforce1 on an Apple iPhone or iPad
- I'm using Salesforce1 on an Android phone or tablet
- I'm using Salesforce1 on an Windows phone or tablet
- I'm not using Salesforce1

Note: The answers to this question may need to be updated if Salesforce1 becomes available on additional mobile devices.

8. May we contact you about your experience at a later date?

- Yes
- No

If yes, please enter your name and email address below.

Name:

Email Address:

Appendix C: Course Quiz Questions

To determine the level of learning of each student the questions in this appendix are included in the associated topic in the course. The student receives immediate feedback as to if they got the question correctly or not and will receive an overall score when they complete all the topics.

Answers in bold are correct. The order of the answers is randomized by the quiz tool.

Using Chatter Topic

1. **True** or False: You can adjust the notification settings in the app.
2. Select all the filters you can sort your chatter feed by:

Post Date

Most Recent Activity

Recent Posts

Activity Today

Creating Records Topic

1. Select all methods that can be used to create a new record:
 - Tap the object action from the chatter feed.**
 - Tap the New button on the object screen.**
 - Tap the New button on the record screen.
 - Tap the plus button in the navigation menu.
2. **True/False:** You can create any Salesforce records using Salesforce1.

Searching for Records Topic

1. What records are searched when using the Search field in the navigation menu?
 - All records you can access.**
 - Only recently viewed records.
 - All records stored on your device.
 - Only records stored in Salesforce Files.
2. To only search the Account records, where would you need to initiate your search from?
 - Accounts list view page.**
 - Contacts list view page.
 - Any Account record page.
 - Navigation menu.

Modifying Records Topic

1. **True/False:** You can modify a record from the related list screen.
2. Select the methods that can be used to modify an existing record:
 - Tap the Edit button on the record.**
 - Tap an update action on the record.**
 - Tap the Edit button on the related list.
 - Tap the update action from the navigation menu.

Using Today Topic

1. What calendar(s) can be accessed using Today?
 - All calendars on your mobile device**
 - All calendars shared with Salesforce.
 - The Salesforce calendar.
 - Tap the plus button in the navigation menu.
2. **True/False:** You can see your local weather in Today.

Appendix D: Focus Group Questions

A post course survey will be provided to those who attend the virtual focus group. These questions will be provided to the participants using the poll functionality of the online meeting tool. Participants will answer these questions at the beginning of the meeting. The participants answers will be calculated and recorded using the online meeting tool.

1. Are you using Salesforce1 on a daily basis?

Yes

No

2. Do you think you are using Salesforce1 more after completing the Using Salesforce1 training course?

Yes

No

If so, by what percentage?

10%

25%

50%

75%

I was not using Salesforce1 before I took the course (Note: This choice will be quantified as a 100% change)

After the participants have completed the survey, the focus group facilitator will begin the discussion by asking these questions:

1. Do you feel that the training course you took helped you learn Salesforce1?
2. What other things would you like to know how to do in Salesforce1?
3. What percentage of your company do you think is using Salesforce1?