INTEGRATING YOUR CRM AND LMS TO DRIVE SALES AND FUEL BUSINESS PERFORMANCE

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INTRODUCTION

The right LMS, when running parallel with your CRM, has the potential to transform engagement within the extended enterprise, boosting efficiency savings, revenue and learner empowerment. The potential for integrated analytics to drive learner performance is hugely promising. The only problem is an apparent lack of understanding of the possibilities of such an integration, a major roadblock to adoption.

It's clear that the benefits of a CRM integration are very real, but unfortunately, the capabilities are limited for no other reason than they're not yet fully understood by CRM users and integrators, nor by the human resources, sales and marketing, customer success and learning and development communities.

How do we raise awareness and reap the benefits of a CRM - LMS integration? This paper intends to accomplish that task and provide the reader with the tools to articulate the value to other stakeholders in their organization. It all starts by choosing the right LMS. A powerful, cloud-based system that supports extended enterprise, mobile, social and informal learning with flexible pricing models that scale with the organization's needs will provide the best chance at a positive ROI.

This report explores the powerful benefits of integration and how to get started in realizing these benefits within your organization. We'll outline the specifications of the right LMS to guarantee the best integration, and discuss a case study of a training business that transformed its service delivery to the waste and environmental services industry.

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THE RISE OF THE CLOUD-HOSTED CRM

Never has there been a greater opportunity to integrate cloud-based applications, and more often open APIs are allowing corporate platforms of all stripes to integrate, producing unexpected, compelling results.

The days of a single, installed system for any purpose are nearing an end.

One of the best examples of this evolution may be the Customer Relationship Management (CRM) platform Salesforce.

In the same vein as other platforms in the cloud, Salesforce has short-circuited the industry to deliver a powerful CRM solution for all types of organizations, allowing companies both new and established to go to market faster than ever.

For context, let's take a look at the size of the market: Software as a Service (SaaS) was believed to be worth $150 billion in 2013. Salesforce alone was projected to be worth $5.3 billion in 2015.

Salesforce is more than a beautiful CRM, it's a Platform as a Service for organizations of all sizes. But even the most versatile of platforms have their weaknesses: Salesforce is not always as easy to set up and provide effective results as many users believe. That's why it's crucial for LMS users to take advantage of the CRM's complete portfolio of features by enabling the two to work in harmony.

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CRM NUMBERS

Once upon a time, CRM offerings from enormous installations like Siebel (now part of Oracle) and SAP were expensive and by their own admission, exclusively aimed at the large enterprise market. Oracle, with only 5000 customers has 4.5 million users while SAP, with 10,000 customers, has 8 million users.

In comparison, there are more than 100,000 organizations across the globe using Salesforce. With more than 5 million users (and growing), Salesforce and the other Cloud vendors illustrate the democratization of CRM into the market.

MAJOR CLOUD CRM VENDORS BY CUSTOMERS AND USERS [1]

VENDOR	CUSTOMERS	USERS	
SALESFORCE	100.000	5 MILLION	
SUGAR CRM	100.00	1.5 MILLION	
MICROSOFT DYNAMICS	40,000	4.5 MILLION	
ZOHO CRM	65.000	13 MILLION	

Zoho CRM has 65,000 customers and 13 million users (reflecting its strength in the Indian market), Sugar has 10,000 customers and 1.5 million users and Microsoft Dynamics has 40,000 customers and 4.5 million users [2].

Despite stellar growth and impressive sales numbers, Salesforce consistently reports losses., improving usage levels and client renewals will be crucial to the company if it is to become profitable something that's best achieved by delivering ROI to its customers.

[1-2] *Capterra*

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CRM AND TRAINING

Salesforce and its partners in training and integration develop eLearning and classroom training for support, technical issues and platform configuration. These assets, research tells us, are mainly focused on supporting the implementation and administration of the CRM. Meanwhile, the provision of materials to support staff engagement and other enhancements is left to the customer to manage.

Largely due to the success of Salesforce, the idea of integrating a CRM with other platforms has never been more enticing.

But the key for improving sales, no matter how well the CRM is configured and aligned to the needs of the organization, is achieve organizational buy-in through a firm understanding of the system's capabilities, both as they apply now and as the organization aims to meet its future goals.

LMS AND SALESFORCE

More than 600 LMS are available to the corporate world, so it's no small feat to narrow down the field of options.

While many top-tier LMS vendors are eager to highlight their Salesforce integrations, the reality of those claims is more nuanced.

The number of available integrations is growing, but Learning Light has found that very few vendors can articulate how their LMS+Salesforce integration operates. In fact, just as few vendors can offer meaningful use cases of successful integrations. Keeping in mind that the majority of integrations on the market are still in infancy, it's reasonable to wonder if these integrations will one day reach their full potential.

According to recent research by Learning Light, 12 UK vendors offer an API-led solution.	Analyst John Leh found 12 US-based vendors who offer Salesforce integration.

On the other hand, there are almost 100 HR systems that offer Salesforce integrations.
Why are HRIS vendors leading LMS vendors in integrating with Salesforce?
We spoke with US-based Salesforce professionals to identify the key reasons:

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1   HR professionals within organizations that use CRM prefer to integrate Salesforce with their HR systems versus with an LMS. This attitude sheds light on the more inward-looking perspective of HR departments, and more importantly, a lack of understanding of the benefits a CRM+LMS integration can bring to an organization.

2   A compounding factor may be that IT departments don't fully appreciate the capabilities of an LMS - Salesforce integration, so other components of the IT stack are taking precedence in discussions about integration plans. Examples of higher priorities for organizations include business analytics and business intelligence solutions to make sense of the vast amounts of data Salesforce generates for an organization, as well as giving higher preference to those HRIS integrations.

3   As a whole, the industry has been slower to realize the changes in the nature of learning in the modern, digital enterprise. Linear learning programs of assigned and reported courses are, in the long term, on a decline. The LMS gets a bad rap: It's too easily associated with this declining pattern.

4   LMS vendors are responding to the knee-jerk, on-demand "learning" satisfied with the "Google-It" mindset, but the response has been mixed and some vendors are confusing informal learning with social learning and employee performance.

> **IT'S CLEAR THAT THERE ARE VERY REAL BENEFITS OF SALESFORCE INTEGRATIONS, BUT UNFORTUNATELY, THE CAPABILITIES ARE LIMITED ONLY BECAUSE THEY'RE NOT YET FULLY UNDERSTOOD BY CRM USERS AND INTEGRATORS, NOR BY THE HR AND L&D COMMUNITY OR THOSE WHO CAN TRULY BENEFIT FROM THE INTEGRATION: SALESPEOPLE, CHANNEL MANAGERS, CUSTOMER SUCCESS PROFESSIONALS AND MARKETING LEADERS.**

[3] *Learning Light 2015*
[4] *John Leh CEO, Lead Analyst at Talented Learning, LLC https://www.linkedin.com/pulse/salesforce-lms-measurable-training-bliss-john-leh?trk=hb_ntf_MEGAPHONE_ARTICLE_POST*

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LMS REQUIREMENTS

Checklist: Is an LMS - Salesforce integration right for my organization?

What does a successful implementation of a new LMS -- or the enhancement of your existing solution -- require? If your organization is considering an LMS that cannot pass this simple test, it may be time to move on to other options.

Choose a Cloud-based LMS Platform.

Essential to the process is the presence of cloud technology, since integration can only occur between two cloud-based solutions. You'll only unlock the benefits of enhanced performance when you take your organization to the cloud, so cloud hosting is the most important aspect of the four-point test.

Extended Enterprise.

Since many of the benefits of a Salesforce - LMS integration will flow from an Extended Enterprise tool, it's important to have an LMS that's capable of supporting Extended Enterprise.

Go Mobile.

Salesforce does mobile very well, so it's important that a potential LMS platform is fully mobile-enabled so no feature opportunities are missed.

Beyond Linear.

An ideal LMS platform is capable of serving up learning materials at the point of need, in small bites that solve a problem with efficiency and ease. The platform needs to offer features that allow users to tag and index content, its rating and ensure content is easy to find.

Ask for Social Learning Features.

Social selling through Salesforce is popular right now, and the platform's chatter function is quickly becoming one of Salesforce's success stories. Take advantage of an evolving attitude toward new learning methods and choose an LMS that includes at least some social learning features. An example would be Docebo's Coach and Share module, which supports social and experiential learning

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Take Advantage of the xAPI Pathway.

Increasingly, part of the learning analytics reporting and integrations will use the xAPI, so an LMS must have a comprehensive roadmap showing how it will be delivered.

Enterprise Standard LMS.

Performance is key: Naturally, LMS integrations with Salesforce are going to make (and use) enormous amounts of data. An LMS must have the firepower to handle data and deliver real, detailed learning and performance analytics.

Pricing Models.

It may sound obvious, but a Salesforce - LMS integration will go beyond linear learning and licensing. Rollouts and usage patterns will be volatile, ebbing and flowing as unpredictably as the company's performance changes and reacts. An LMS that flexes its prices to meet demand is better than fixed pricing models based on user licenses.

Embrace Gamification.

As far as engagement goes, gamification is a key requirement for any learning project, and we recommend placing it high on the requirements list.

Use Cases.

It's crucial to demonstrate an understanding of the challenge at hand, as is equipping L&D and other departments with the variables to turn the "so what?" response to an integration request. That way, the use case (and the vendor's expertise) wins credibility and is promoted on the organization's list of priorities.

The bottom line: If you wish to integrate an LMS with CRM, make sure it's cloud hosted, that it supports mobile and social learning, gamification and is an enterprise standard with firepower and flexible pricing models. If the LMS (existing or planned) does not support these features and have pricing flexibility built into the cost model, move on to one that does!

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ALIGNMENT TO ORGANIZATIONAL REQUIREMENTS

Assuming you've followed our advice above and selected the appropriate LMS cloud platform, your challenge now is to deliver a learning program that's aligned to the CRM in a way that drives engagement and performance. This is more about fostering a culture where learning emerges as a KPI for growth than it is about good practice.

It's important to note Salesforce's performance in organizations and realize how important learning will be to improve engagement and effect. Take a look at some numerical evidence:

The Problem with Salesforce: A Systemic Lack of Buy-In

- AMR Research shows that 35% of CRM implementations battled serious user adoption issues, though this is down from 47% [5].

- CSO Insights and GoToMarket strategy research indicates that the average CRM customer had less than 75% adoption rates among sales teams [6].

- There is a lack of buy-in at the top of many organizations, so the full capacity of CRMs are being ignored [7].

- According to Software magazine, just 30% of companies that deploy CRMs report significant increases in sales [8]. A key part of the solution is more effective training, and a great way to accomplish that is to integrate the LMS with Salesforce for to deliver the training.

"How can my company land in the **30%** of those that improve sales performance with Salesforce, and not the **70%** who see no difference?"

We're so glad you asked!

Based on our extensive research into the limited number of Salesforce - LMS integrations on the market, we've come to determine that such an integration can make all the difference.

[5] *Taber D (2014) Salesforce.com, Secrets of Success (best practices for Growth and Profitability)*
[6-7-8] *ibid*

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ENGAGEMENT + ALIGNMENT

It's also important to understand what a successful Salesforce deployment (or re-invigoration) looks like for your organization, and to ask where the learning and training effort should be focused to have the greatest impact on revenue. As will quickly become obvious, team engagement with the CRM is just the beginning.

Taber's 2014 publication of "Salesforce.com: Secrets of Success (Best Practices for Growth and Profitability)" identifies three factors for Salesforce success:

People

People need to be committed to -- and capable of -- using the Salesforce platform to solve their customers' problems and to deliver enhanced services.
Whether they're employees, channel partners or distributors, they need to know how to deliver the correct service well. Increasingly, companies are competing as much on delivery as price.

Products

Just as important to sales growth as a solid product knowledge is the practice of offering support and additional services when using a CRM. That way, the organization gains a complete organization of the customer's unique situation. An LMS can support product knowledge training, an obvious requirement across the entire organization, including channel partners, distributors and the sales team.

Processes

Processes -- the way people work with the CRM -- are vital to the success of a CRM-led business. Data accuracy and data interpretation are key areas where processes must be understood and followed (for example, in compliance training scenarios).

Think of the People, Product and Process learning continuum like the layers of an onion; when one is peeled away, another layer of sales performance improvement is revealed. Formal training and social learning plays a significant role in all of these factors.

The more layers can be addressed by using learning, the more the organization will be able to enhance its business performance. Adoption and correct usage of the Salesforce CRM is going to be a key differentiator in the company's sales improvement, regardless of how well the deployment is configured and aligned to the organization.

Even at the lowest level of integration -- simply assigning, recording and reporting training for CRM engagement in a singular environment, using the CRM to import records from the LMS can have a major impact on alignment and visibility.

If you can see learner engagement aligned with training records, you can gain a clearer picture of reticent users, and find a point of negotiation in the organization to energize meaningful use.

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Taber's handbook of successful Salesforce deployments (which misses the importance of LMS integration) expressly advises organizations to take an assertive approach to achieving user engagement. But it's perplexing that this route isn't highlighted in more detail at both DreamForce and in the limited literature available about successful Salesforce integrations. Could it be that the complexity of deploying Salesforce saps resources?

An LMS - CRM integration evolves as time goes on: It may start as an engagement project, move to a more detailed integration and, eventually, morph into a seamless, strategic integration around the Extended Enterprise model.

WHAT WILL AN INTEGRATION JOURNEY LOOK LIKE?

Driving Engagement

Probably the most telling trait of an effective training program is whether it becomes part of a habit -- when people do the right thing almost automatically and without question. One learning challenge is embedding that habit of effectively using Salesforce.

In many cases, largely because of Salesforce's exceptionally-built ecosystem of training and integration components, CRM configuration goes smoothly. It's when the end user is looped in all the salespeople, customer support people, re-sellers and channel partners are expected to buy into the CRM and contribute that many projects go awry.

To prevent this, it's crucial to, first and foremost, sell the benefits of Salesforce. Training courses, whether face-to-face or online, will play a large part, and an LMS can track and record how the users are progressing in their learning plans.

ELearning modules and courses that simulate CRM processes will help users gain confidence using the CRM, while meeting objectives and exchanging data to show management CRM competency for each user .

This type of data exchange is a good starting point, but no learning continuum (or business) can stand still for too long (even though 70 percent apparently do). LMS - CRM integrations can deliver and track the progress of highly-skilled people. The integration should be seen as a journey the importance of learning to an overall mission should always be highlighted at the beginning of the exercise, not as an addendum.

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Designing Cost with a Dynamic Integration

Above, we identified the first level of integration as exchanging records from the LMS platform to the CRM, and vice versa. This kick starts the process by addressing basic engagement challenges and covers the first layer of our "People, Process and Product" onion metaphor.

INTEGRATION ELIMINATES THE NEED FOR DUPLICATE DATA ENTRY, ALLOWING AN LMS ADMINISTRATOR TO ASSIGN A USER TO SEAMLESSLY ENROLL IN A COURSE IN ONE SMOOTH INTERACTION, WHILE BOTH PLATFORMS ARE UPDATED SIMULTANEOUSLY.

This way, plenty of CRM and customer interaction training be can facilitated and recorded in one place.

Wouldn't it be great if while using the CRM a salesperson, channel partner or other learner could access course material quickly and independently, exactly when they need it?

Great question! An LMS integration would provide a "Learning" tab in the CRM to help the user find the information without ever leaving the CRM.

Learning is now being addressed at the point of need, and if the ambition is great enough, this integration can foster better skills in processes and products.

With a solid foundation for your LMS - CRM integration, your organization will reap several operational benefits:

- Integrating your LMS with Salesforce eliminates problems caused by duplicate data entry and having to operate more than one system. A learner can register one time and access courses in both the LMS and the CRM.

- The LMS administrators will have an individual's records in the CRM without having to create a learner record inside the LMS, saving time.

- A learner's competency related to compliance processes or training on new products or services can instantly be seen in the CRM.

- Line managers can see learners' reported activities in the CRM.

- Extended Enterprise capabilities seamlessly allow training information for channel partners and resellers in the CRM.

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Aligning the Benefits of Training and Learning to Performance

It's important to align learning and development with organizational performance. Learning aligned with and delivered seamlessly through a customer-oriented interface will give more context to performance initiatives than learning that's disconnected from the interface.

ROI

Calculating ROI for an eLearning rollout isn't a new concept. Scoring on time-to-competency or learner performance can enrich the ROI and contribute to lower staff turnover and fewer errors.

However, very few LMS eLearning roll-outs have been able to measure the ROI at the individual level in sales performance or customer service, nor have they been able to measure any interaction aligned to training and support at the point of need.

> **ON THE OTHER HAND, WITH AN LMS – CRM INTEGRATION THE FOCUS IS SHIFTED FROM COST-SAVINGS AND SOFT TIME-TO-COMPETENCE MEASURES TO SALES FIGURES, SERVICE METRICS AND, JUST LIKE THAT, LEARNING AND BUSINESS PERFORMANCE BECOME TRULY ALIGNED.**

Some organizations calculate CRM ROI against their investments, while others see a CRM as a replacement for a system of spreadsheets. Taber estimates a Salesforce deployment for 100 users could exceed $100,000 per year, while disclosing that discounts are not provided. It's not easy for a company to downgrade its Salesforce package, but comparatively, the cost for a cloud-based CRM will still be much lower than an equivalent in-house software solution.

A typical LMS would cost much less for 100 users, though -- just a few dollars per month, per learner (about 10-20% of the CRM cost). As with an LMS project, it's easier to find cost savings in a CRM deployment than to make CRM-triggered sales growth projections. (But remember: 70% of organizations see no additional benefits from using Salesforce in the first place.)

Salesforce emphasizes improving workflows by removing data entry and administrative tasks, but it places even more focus on the ability to use real-time information to make better forecasting decisions. Performance-driven sales and service targets and winning new business are also major contributing success factors for the CRM.

ROI models for calculating cost reduction should be conservative until the data becomes apparent in the CRM, and until users can move through the five levels of the Salesforce user maturity model.

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The ROI from CRM-LMS integration will become apparent (and measurable) as the number of administrative and reporting tasks are reduced. Disseminating enhanced sales figures from an LMS-CRM integration, however, will be more difficult to untangle.

But it shouldn't go unnoticed that the integration of an LMS with a CRM can unlock considerable benefits, as in the case of one training business:

The company allowed learners to move seamlessly between the LMS and CRM and, in order to get accurate data from billing points, monitored learner progress. The company saved an estimated 1.25 FTE equivalent in a team of six people. This amounts to a 20% headcount savings in learner administration costs.

Additionally, the improvements in learner outcomes translated into sales growth. The LMS and CRM systems two systems became a catalyst for each other, contributing to one smooth cycle, and a 35% uptick in sales.

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CASE STUDY: HOW ONE TRAINING COMPANY SUCCESSFULLY INTEGRATED ITS LMS AND CRM

In one shining example of LMS - CRM integration, a niche UK-based training provider revolutionized the way training development is delivered to the waste and environmental services industry.

As part of an enormous industry with numerous requirements for highly-trained individuals to manage on-site operations, the waste and environmental services sector is one with several unique training needs.

In the UK, this particular market is driven by regulation but infested with low learning achievement among employees. Each site has mandatory training requirements, such as certifications in health and safety and environmental protection.

With regulations and environmental pressures mounting, the training company was fielding a growing number of inquiries for compliance courses each week.

The CRM and Learning

Our story begins about three years ago, when the company began to explore how a CRM could be used to handle such inquiries. Could it help employees follow up, assign learners to learning programs and match assessors with the appropriate programs?

The LMS

Meanwhile, the company embarked upon the journey toward deploying an LMS to track and record the learner's actual progress, paying particular attention to managing tests and uploading learning evidence.

The company had invested in using eLearning modules as part of its provision of industry courses a considerable innovation in its own right. But naturally, the LMS would play a crucial role in delivering the eLearning.

The company used the LMS to manage a complex web of competency requirements as well as the pool of assessors who delivered a blended learning program. ELearning modules were built for the LMS, while learning pathways were developed in the LMS. From there, the company could design certificates and compile all assets into a comprehensive online catalog.

The training company recorded more than 500 learning interactions across several Level 2 to Level 4 courses, as well as mandatory health and safety courses. The LMS was driving innovation, and allowing the provider to become a cost leader and expand its service area.

Meanwhile, however, the CRM deployment across the organization didn't go as smoothly. But the benefits of web and telephone inquiries being stored in a single system proved powerful enough to drive engagement. The company used the CRM to develop template responses aligned to the myriad of qualifications and inquiries, and as data entry improved, so did the company's performance.

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The company began running more efficiently than ever before: The CRM improved lead conversion, helped record, allocate and follow up on inquiries and boosted marketing campaigns. One SEO campaign in particular was so successful, in fact, it allowed the company attract inquiries from across the UK. This proved both a challenge and the genesis of a new plan to provide a nationwide eLearning-led solution.

The business model allowed payments based on the stage modules completed, so the accuracy of likely revenue was tightly aligned to learner progress. But a major issue was that the CRM didn't track learner progress with each course module, meaning the CRM couldn't forecast completions nor could it manage the available capacity of the assessors to deliver the courses.

This information was seemingly locked inside the LMS.

Although the company's use of eLearning allowed them to undercut the price of existing paper-based learning and offer qualifications on demand, they knew that in order to offer distance courses, they needed to further improve the learner experience and manage the assessment process very closely.

The Integration and its Benefits

The LMS was key to delivering a nationwide service, but the growing amount of data that was being independently generated by the CRM and the LMS, as well as the need to develop smarter resource allocation against the growing number of inquiries, prompted the question: Can we integrate the LMS and CRM?

The integration had some powerful incentives: The company would be able to remove data duplication and seamlessly advance the inquiry to registration and tracking then, later, assessment for 500 learners per month.

An API acted as a bridge between the two systems to allow the data to move from the CRM to the LMS and back again. The training provider could now see learner progress in the CRM.

Once a lead entered the system and became a learner, they were automatically registered in the LMS, then enrolled in the appropriate course. Bending the CRM allowed the testing instructor to record activities in the LMS and provide updated information on learner progress in the CRM against his or her assigned courses. Each course module was treated as a sale unit and, upon completion, an invoice would be raised. Billing became automatic, since the CRM integrated with the accounts department.

Calls from learners (and their employers) checking on progress and invoices became much easier to handle, as did chasing invoices against progress.

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Before Integration:

- Multiple, dissimilar inquiries were generated in the CRM against a wide range of course options. This function generated learner accounts, but didn't assign any learning, leading to costly, time-consuming data duplication.

- Inefficient management of assessors and problems managing and reporting learner progress between the LMS and CRM led to difficulties predicting and managing revenues and cash flow.

After Integration:

- The training company saved time and money caused by duplicate data.

- They were able to provide a more efficient and attractive service to current customers, and attract new customers by leveraging the CRM to manage engagement and communications.

- The company could manage its resources more effectively to ensure the right assessor was assigned to the customer.

- The company can now forecast cash flow and sales revenue, while driving down the cost of delivery and winning new business.

Although no learning was added to the CRM, the revolutionized business process went beyond a superficial data exchange between the two systems, making this case an excellent example of a dynamic integration. The two systems working in harmony deliver a seamless experience for learners while helping the training company save money by eliminating duplicate data and enhancing operations.

However, we should note that this case study by no means fully exploits the extended enterprise opportunity that a Salesforce - LMS integration would offer.

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THE EXTENDED ENTERPRISE OPPORTUNITY

LMSs like Docebo support extended enterprises by allowing companies to train channel partners and resellers. The benefits of well-trained partners are considerable, but an LMS alone cannot measure actual impact from the training delivered.

CRMs are powerful tools to support and manage the channel partner or reseller. The CRM can send partners through the pipeline to individual support staff as needed.

Organizations like Apple (and others) have proven that the better a sales associate is trained on the product they're selling, the better their sales performance will be. Integrating the LMS and CRM for extended enterprise allows organizations to associate sales results with course completion.

Learning and performance are becoming more and more measurable, and the opportunity to offer certification programs to partners is considerable, allowing the organization to reward learning while publicizing its commitment to quality.

STRATEGIC INTEGRATIONS AND LEARNING ANALYTICS

The xAPI offers the kind of detailed information interchange that allows the CRM and LMS architecture to deliver real business performance in the way of learning performance analytics. It allows organizations to track learning and performance at a granular level, and align learning and performance to reflect in the company's KPIs -- something that's often promised but less often delivered.

CONCLUSION

The right LMS, when partnered with a CRM;s like Salesforce, has the potential to drive revenue by making learning easier for internal sales teams, channel partners, customers and other stakeholders transform engagement, extended enterprise, efficiency savings and learner empowerment. Organizations can reap the additional benefits of increased engagement, efficiency savings and learner emplo
ywerment. Additionally, tThe potential for integrated analytics to drive learner performance is huge.

It's no longer enough to simply "have a CRM." It's about choosing the best LMS to help unlock this opportunity and use the enormous amounts of data coming from Salesforce and using it to its best potential to integrate learning at the point of need.

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DOCEBO SALESFORCE INTEGRATION

Salesforce and your Docebo LMS: A Match Made in Heaven? Drive Sales, Increase ROI and Fuel Business Performance.

When Salesforce and your Docebo LMS join forces, you have an unprecedented view of the effectiveness and the business impact of your training platform.

- Enable your sales team to increase average deal size and improve win rates

- Measurably increase partner channel performance by seamlessly tying training completion and channel sales numbers together

- Increase adoption and renewal of your product

- Generate new streams of revenue by selling training content

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Critical Questions to Align an Integration to your Business Needs

How can I increase revenue in my organization?
How do I gain insight into the value of training for my partners and customers?
How do I demonstrate that account executives sell more after they are trained on product and sales process?
How can I measure if partners sell more after being certified?
Is it true that customers renew at a higher rate when trained?
Does training completion correlate to an increase in upselling and cross selling at our accounts?
How can we streamline processes so we sell more online training products?

By answering each of these questions you can start to build your business case for an integrated LMS+CRM solution..

The Answers Require Alignment between L&D and the Associated Revenue Generating Team.

L&D and Sales, Customer Success and Marketing live in very different worlds. Training people, system admins, salespeople and learners typically are accustomed to using two different systems. One is the CRM (Salesforce) the "system of record" for sales and customer success, where accounts, contacts, customers and product catalogs live. The other one is the LMS, which manages training for employees, partners and customers and enables selling training products (courses) online. Since these records also exist in the CRM, if the two systems don't talk each other, keeping them synchronized is a constantly manual, error prone and time consuming effort. Not only that, but items like users or accounts are organized in different ways in the two systems, which add sophistication to the design of an integration.
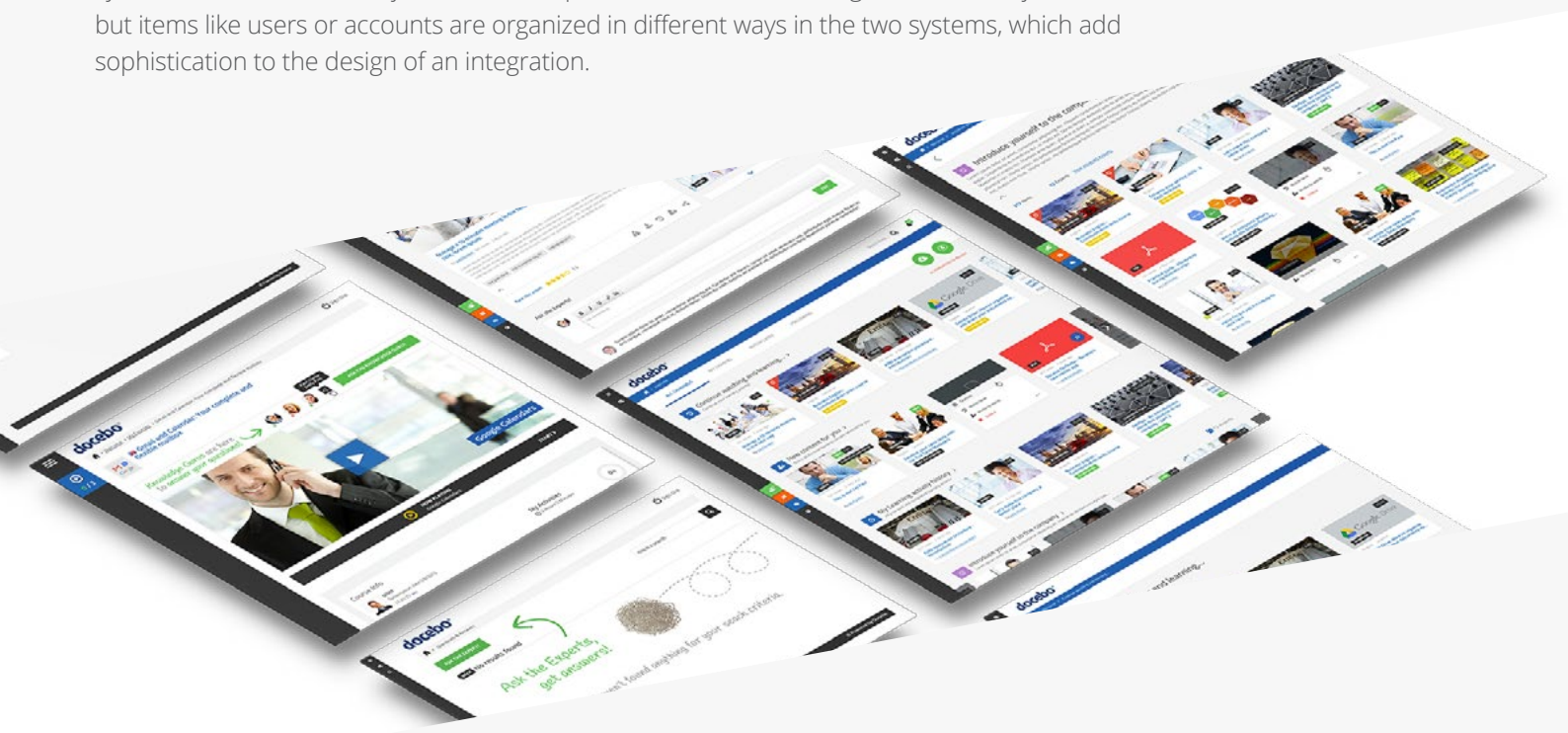
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Docebo's Solution

First, let's map the primary integration points between the two systems

SALESFORCE CRM	DOCEBO LMS	
LOG IN	NOT REQUIRED *(Single Sign On integration with Salesforce)*	
USERS *(e.g. salespeople in the organization)*	USERS *(learners)*	
ACCOUNTS *(e.g. customer or prospect companies)*	EXTENDED ENTERPRISE ORGANIZATIONAL NODES *(branches)*	
CONTACTS *(Account's employees)*	USERS (LEARNERS) IN CONTACTS' BRANCHES	
TRAINING ASSIGNMENT	ENROLLMENT IN COURSE OR LEARNING PLAN	
PROGRESS, COMPLETION AND CERTIFICATION STATUS	PROGRESS, COMPLETION AND CERTIFICATION STATUS	
SPECIFIC PROPERTIES OF ENTITIES *(e.g. users, accounts, contacts)*	GROUPS OR ORGANIZATIONAL NODES *(branches)*	
HIERARCHICAL ORGANIZATION OF USERS AND CONTACTS	HIERARCHICAL ORGANIZATION OF USERS (CAN BE FLAT IF NEEDED) AND/OR GROUPS OF USERS	
PRODUCTS	LEARNING COURSES OR LEARNING PLANS IN A CATALOG	
SALES ORDER	SALES ORDER	

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Features of the Docebo Salesforce Integration

Single sign on

Never use different credentials multiple times for the two systems

Eliminate duplication of information

Seamlessly map any hierarchical organization of entities in SF to the same structure in Docebo to mirror the same behavior in both systems, while SF stays as the system of record for users, accounts and contacts.

Automatic course enrollment

Perform automatic enrollment to courses or learning plans in Docebo based on triggers in Salesforce. Examples include enrolling new hires after a given date to a specific onboarding learning plan in Docebo, or enroll your regional sales team to localized sales enablement materials for a newly released product.

**At a glance visibility of training**

Achieve or update certification status in Salesforce upon completion of certification or retraining program in Docebo. View progress and status of courses taken in Docebo from within Salesforce, in real time.

Automate billing process

Sell courses from Salesforce and automate the billing process. Sales orders are automatically created in SalesForce when courses are sold in Docebo, which also eliminates invoicing errors.

Run advanced reporting

Any report in Salesforce, standard or custom, can be informed by data in Docebo, such as progress and completion status of training assignments and certifications, or training products sales rates. Training data can also be used in Salesforce to build analytics dashboards.

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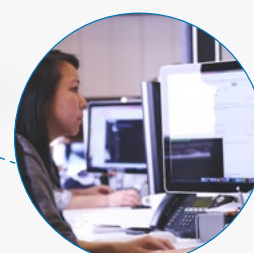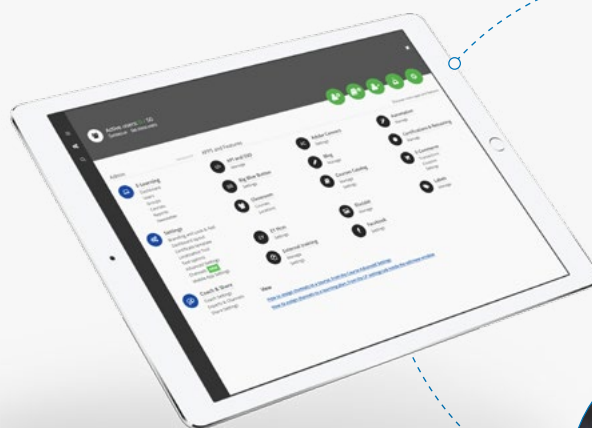
Only the right LMS will get the full spectrum of benefits of a Salesforce integration

Native, 100% cloud

As all enterprise business systems should be (and they are, for the most part)

Highly scalable and expandable

Pick a system that doesn't overwhelm you with too many features. Go for one that can get you up and running quickly, then allows you to turn on more functionality as your learning project evolves and new use cases emerge.

Modern UI for ease of use

Too many systems still overlook this fundamental, essential factor for ROI. Choose a system that has a slick, beautiful UI designed for fast adoption across usage scenarios.

Mobile enabled

Empower learners to access (and create) learning content anytime, anywhere, from the mobile device of choice.

Include gamification

Apply gamification elements such as awards, leaderboards and contests to feed your workforce's competitive nature to increase engagement and knowledge retention.

Supports informal learning

Traditional LMSs only address one of the ways in which people consume and retain information, formal learning. Select an innovative learning technology that support social and experiential learning modalitiessales.

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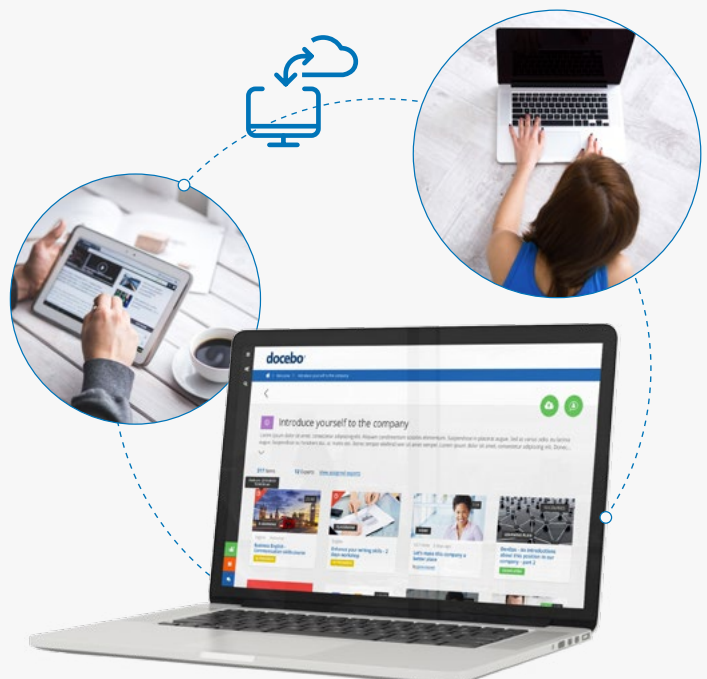
And, most importantly, full extended enterprise support

The most critical factor in choosing a learning management system is end-to-end support for Extended Enterprise. Which means the ability to engage, train and enable external audiences such as partners, customers and members, all from a centralized LMS. Essential characteristics include:

- Create custom branded portals for each LMS and mobile LMS. This way your customers and partners will see their branding, showing your commitment to their success and creating familiarity for their learners. Simple and secure LMS access with multiple authentication methods

- Delegate administration while controlling content. Assign administrative rights to your customers and partners so they can manage admin tasks while you maintain control over the knowledge assets that are being delivered

- Leverage a variety of different authentication methods to enable your partners and customers to access learning content easily and quicking, improving course completion and customer/partner adoption

- Privacy for each of your unique audiences. Each LMS is unique for your customers and partners so learning content is only shared from the parent administrator or within each LMS. Customers and partners will never see content or metrics for any of the other LMS instances.
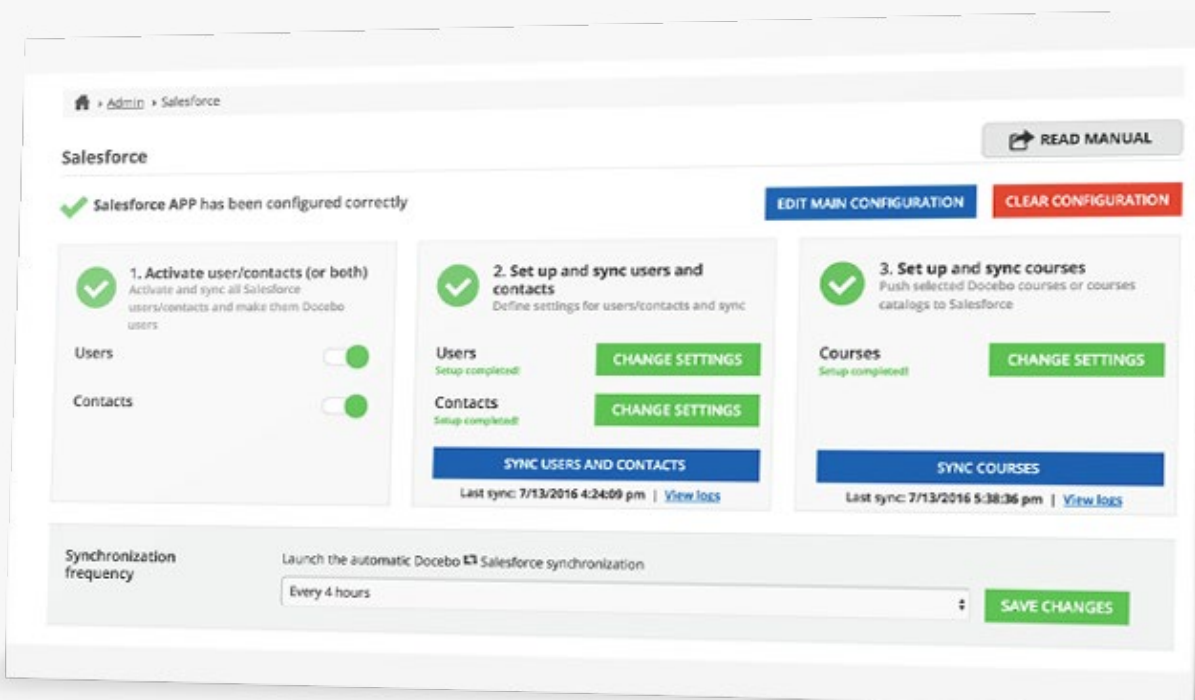

Fig 1. Admin settings panel for Docebo's Salesforce integration

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THE LMS YOUR PARTNERS WILL LOVE TO USE

Don't leave your partners without the right tools to represent your brand. Docebo supports social and mobile learning to ensure your partners are armed with the right training content, whenever they need it, with a full suite of integrations and automation tools to reduce your time investment while fostering stronger relationships. Meanwhile, Docebo's advanced reporting tools can help you prove and improve the return on channel investment.

See the Docebo learning management system in action!

REQUEST A DEMO

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