Heroes

Salesforce Gamification App (MVP)

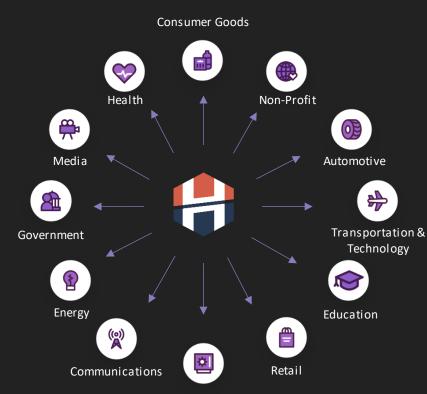## Make Every Task an Adventure

May 2023

Goals and Solutions

Why

Salesforce software adoption directly impacts the success and growth of an organization. By investing in effective adoption strategies, organizations can ensure that their Salesforce are being utilized to their full potential, leading to increased productivity, efficiency, and success.

How

By incorporating gamification techniques into software, business can encourage users to take specific actions and engage with the platform in a more interactive and fun way. This can lead to increased user retention, loyalty, and overall satisfaction.

What

Inspired by the best game industry projects like, we have created an app where a user can advance in the rank and compete with other users.

Consumer Goods

Health

Non-Profit

Automotive

Media

Transportation & Technology

Government

Education

Energy

Retail

Communications

Financial Services

Customer's challenges

Most companies face challenges in adoption of new Software. Right after go–live the usage of the system could be low and overall adoption may be poor. Old habits stands on the way of good adoption as users do not hurry to study out new systems and to adopt to the new reality.
Usually, the following human factors are behind that:

- No motivation
- No understanding of benefits
- Lack of time
- Old habits
- Lack of trainings and/or support
- Solution/configuration doesn't meet user's expectations or needs

In a result, the customer could not fully benefit from all the Salesforce features just because of the low usage, lack of data, poor data quality, low adoption level.
Users are unhappy and frustrated.

EPAM Response

Epam developed the free of charge and flexible Gamification Package that is intended to increase customers' level of Salesforce adoption by strengthen the target behavior:

- Make use of Salesforce being the single source of truth for sales activities
- Generate more content
- Keep data up to date
- Enrich the data with discussions over the topic
- Derive insights via reports/dashboards
- Share and collaborate

In a result, engaged and motivated users adopt to the system easier and generate more Salesforce content, resulting in more transparency, better data quality, quicker adoption, competitive atmosphere as well as adding more value for customers in a long-term perspective.

Target Group

Who is a customer?

- Companies that have just switched to Salesforce
- Companies that experience issues with Salesforce adoption
- Companies that buy Salesforce implementation from EPAM

What is a User Persona?

There is no common portrait of end user as it depends on the customer type. Basically, anyone with access to Salesforce. We assume that majority of end users will be from Sales & Marketing. Personal characteristics will vary depending on companies' industries, territories, corporate culture, etc.

Value

Value for customers:

End users are self-motivated to:

- Study new system
- Generate more valuable content
- Keep data up to date
- Quicker and smoother adoption
  Save time and efforts on adoption
- Free app that can be easily adjusted to different types of businesses

Value for end users:

End users could have some fun out of:

- Competition
- Rewards
- Recognition
- Learning is easy and fun
- More motivation to perform routine tasks

Big Picture

- Solution is performance-based sales gamification
- The MVP concept is based on PBL (points, badges, leaderboard) elements
- The user receives points for defined actions in Salesforce. The scoring points are divided into categories that should reinforce the needed behavior. The user is awarded with badges based on the number of points as well as being leveled up
- The solution is flexible and can be adjusted to every client
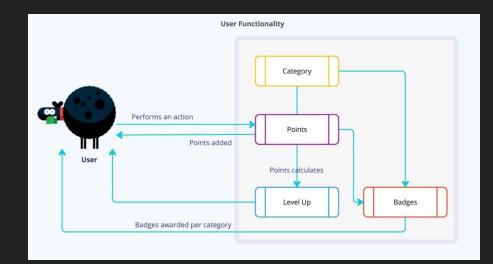
MVP Includes Basic Functionalities:

- Accrual of points for actions
- Awards Elements (Badges & Levels)
- Scoring Page where Gamification users can overview their performance
- Admin Panel where Admin can manage gamification elements to adjust the package to business needs
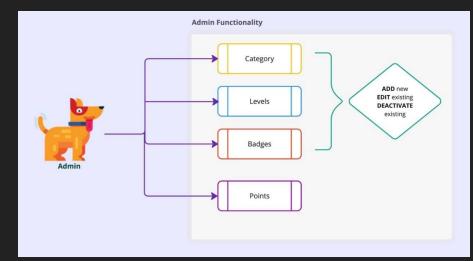- Reports/Dashboard
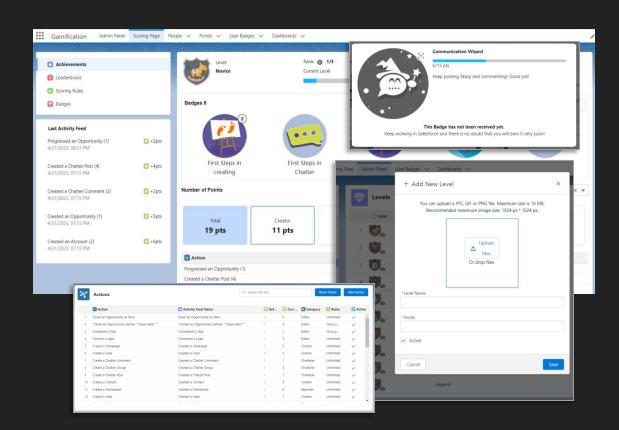
Make Every Task an Adventure

Our app transforms the daily tasks and activities of Salesforce usage into exciting challenges, making it more engaging and enjoyable for the team.

With the Heroes app, users will be motivated to complete tasks quickly and accurately to earn points, badges, and climb the leader board. The app encourages healthy competition and fosters team collaboration, resulting in improved adoption and better overall performance.

Product Overview

Scoring Page

This is a tab for Gamification Users, where they can easily navigate between the key elements:
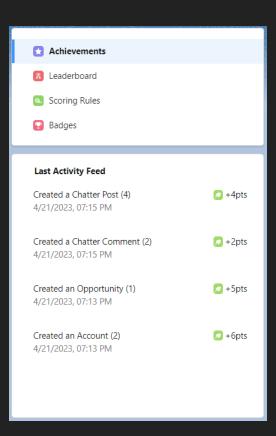
Achievements: keep an eye on their overall progress

Leaderboard: compare the results against other gamification users

Scoring rules: know about the rules and Actions included into gamification

Badges: enjoy the achieved results and see the result of other participants

Last Activity Feed: check the latest actions performed and number of points awarded

Scoring Page: Achievements

Compare results against others based on the last 30 days activity

Visual representation of Level progress

Current level

Earned and WIP Badges

Earned points by Category with ability to drill down

Activity trend chart

Scoring Page: Leaderboard

Recent overall statistics
(Last 30 days)

Filters and easy search options

Top Users are appreciated
and highlighted

Leaderboard with all related
data

Scoring Page: Scoring Rules

Filters and easy search options

General Info

General Info

- Grow your skills and efficiency in Salesforce by performing actions
- Contribute to your team success
- Celebrate new levels and badges with your colleagues

Filters   Reset

Search   Category

🔍 Search this list...   Choose Category... ▼

List of actions included into gamification

📊 Action Name	📊 Category	📊 Points	📊 Allocation Rules
Close an Opportunity as Won	Editor	5	Unlimited
Close an Opp before Close date	Editor	2	Once per record per day
Complete a Task	Editor	1	Once per record per day
Convert a Lead	Editor	5	Unlimited
Create a Campaign	Creator	5	Unlimited
Create a Case	Creator	5	Unlimited
Create a Chatter comment	Chatterer	1	Unlimited
Create a Chatter Group	Chatterer	5	Unlimited
Create a Chatter Post	Chatterer	1	Unlimited
Create a Contact	Creator	3	Unlimited
Create a Dashboard	Reporter	6	Unlimited
Create a Lead	Creator	3	Unlimited
Create a Report	Reporter	3	Unlimited
Create a Task	Creator	2	Unlimited

Scoring Page: Badges

Filters options

Hello, friend!

Choose any user to see all the badges that you earned or going to earn very soon.

Filters

Reset All

User

Pavel Kazeyeu ✕

Show Badges

All

Category

All

List of badges segmented by categories

Chatterer:

First Steps in Chatter
1/5 pts
You just learned how to use Chatter! Keep going!

Chatter User
6/10 pts
Keep it up with Chatter posting! You rule!

Communication Wizard
6/15 pts
Keep posting liking and commenting! Good job!

Creator:

Content Master
1/10 pts
Your contribution is invaluable! Keep going!

First Steps in creating
1/5 pts
A long journey beg... step. You made it!

Fantastic Contributor
11/15 pts

Ability to drill down to see details

Editor:

Data Polisher

First Steps in editi...

Pavel Kazeyeu

Data Polisher
2/10 pts
You really like things to be neat! Awesome job!

This Badge has not been received yet.
Keep working in Salesforce and there is no doubt that you will earn it very soon!

Admin Panel

Only Admins (Users with 'Gamification Admin' perm set) can access Admin Panel in order to manage the users' journey:

- Create/edit gamifications elements, such as

Categories (create, edit, inactivate, delete)

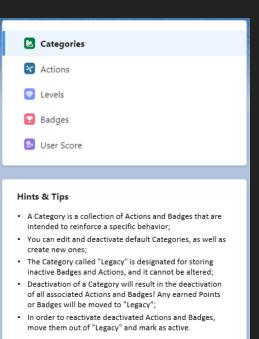Actions (create, edit, inactivate, delete)

Levels (create, edit, inactivate, delete)

Badges (create, edit, inactivate, delete)

- Overlook every gamification user performance via

User Score

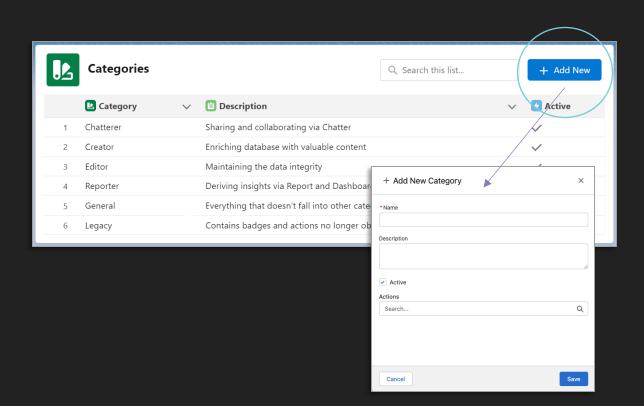!!! Every page has its own Hints & Tips to facilitate the Admin's work

Admin Panel: Categories

6 out-of-the-box Categories.

Admin can manage Categories according to business needs and goals:

- **create** new ones
- **edit** (name, description)
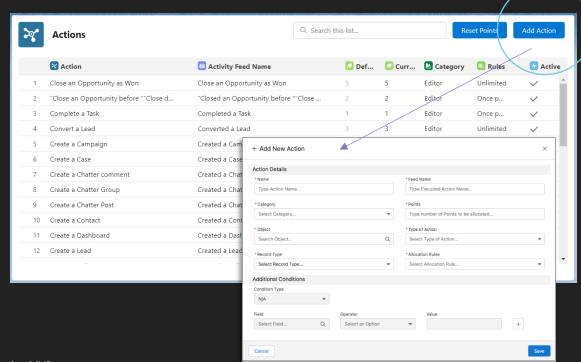- **deactivate**
- **delete**

Admin Panel: Actions

34 out-of-the-box Actions distributed among default Categories.

Admin can manage Actions according to business needs and goals:

- **create** new ones

- **edit*** (Names, # of points, Category, Allocation Rules
(Unlimited / Once per record per day))

- **reset** Points to default

- **deactivate**

- **delete**

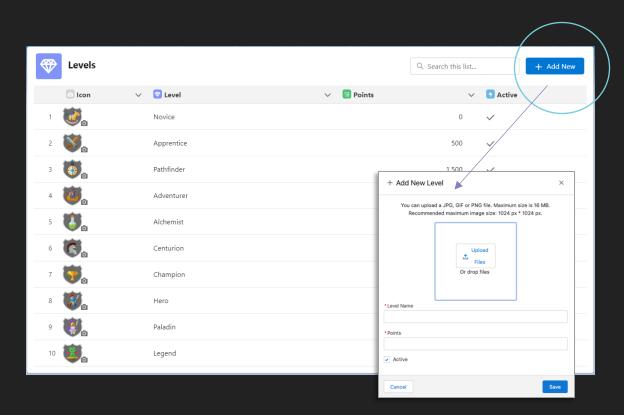*ability to drill down into action to edit conditions was postponed to MVP+

Admin Panel: Levels

10 out-of-the-box levels with icons.

Admin can manage Levels according to business needs and goals:

- **create** new ones
- **edit** (icon, name, # of points)
- **deactivate**
- **delete**

◆ **Levels**

Search this list... | **+ Add New**

	📷 Icon	🛡 Level	📋 Points	⚡ Active
1		Novice	0	✓
2		Apprentice	500	⌄
3		Pathfinder	1,500	✓
4		Adventurer		
5		Alchemist		
6		Centurion		
7		Champion		
8		Hero		
9		Paladin		
10		Legend		

+ Add New Level   ✕

You can upload a JPG, GIF or PNG file. Maximum size is 16 MB.
Recommended maximum image size: 1024 px * 1024 px.

⬆ Upload Files
Or drop files

* Level Name

* Points

☑ Active

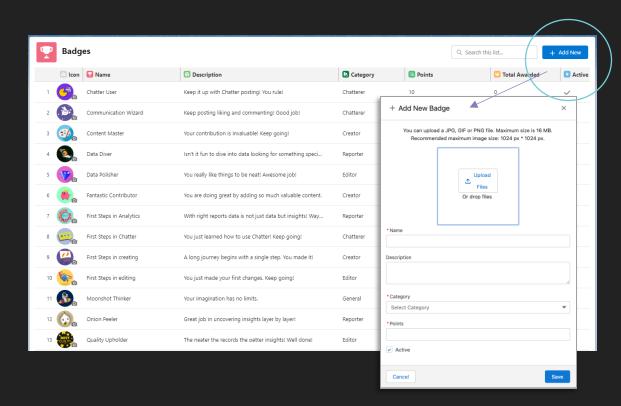Cancel   **Save**

Admin Panel: Badges

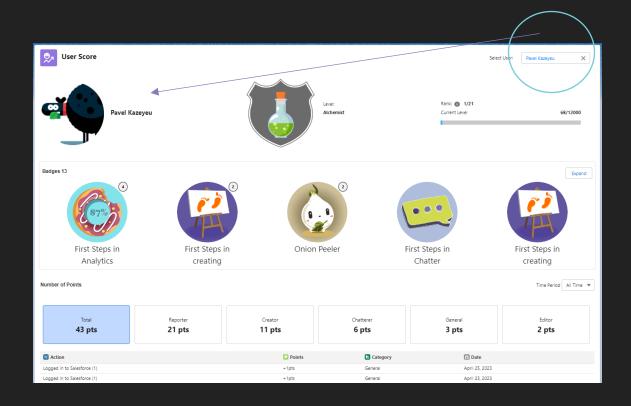**13** out-of-the-box Badges with icons distributed among default Categories.

Admin can manage Badges according to business needs and goals:

- **create** new ones

- **edit** (Icon, Name, Description, Category, # of Points)

- **deactivate**

- **delete**

Admin Panel: User Score

Admin can view a Gamification user's performance and statistics. The data displayed will be identical to the information shown on the user's Achievement page.
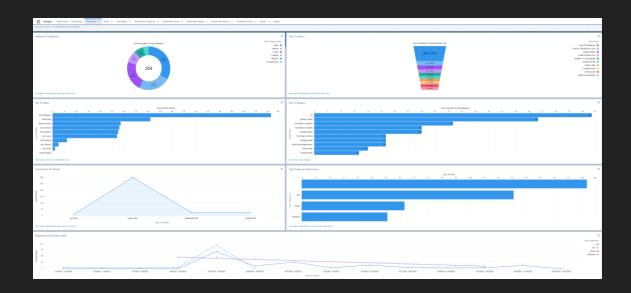
Dashboard

1 out-of-the-box Dashboard for Leadership that includes:

- Actions by categories

- Top 10 Actions

- Top 10 Users

- Top 10 Badges

- User Activity Per Month

- User Points per Department

- Department activity per week

What will come next...

MVP+ features including but not limited to:

Feature name	Description
'Give a Badge' feature	Ability to exchange badges from (Appreciation) Category
Manage User Points	Ability add/remove/reset User Points via UI in Admin Panel
Change texts on Scoring page/ manage filters on Leaderboard	Ability to adjust displayed custom Texts on Scoring Rules page, according to business requirements. Ability to add custom filters to Leaderboard (Level, custom department/Unit etc.)
Animation elements	Replace "Activity trends" Chart with visual and animated pic (e.g., from seed to tree)
Gamification "Off"	Ability to not receive posts, deactivate tabs, be excluded from leaderboard
Actions management	Ability to drill down to custom Actions to edit conditions
Integration	Ability to sync package with Client's internal systems
Mobile	Ability to access package via Mobile App
Reminders	Daily progress reminders to a user

Thank You!