

<epam>



Heroes

*Salesforce Gamification App
(MVP)*

Make Every Task an Adventure

May 2023

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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.



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

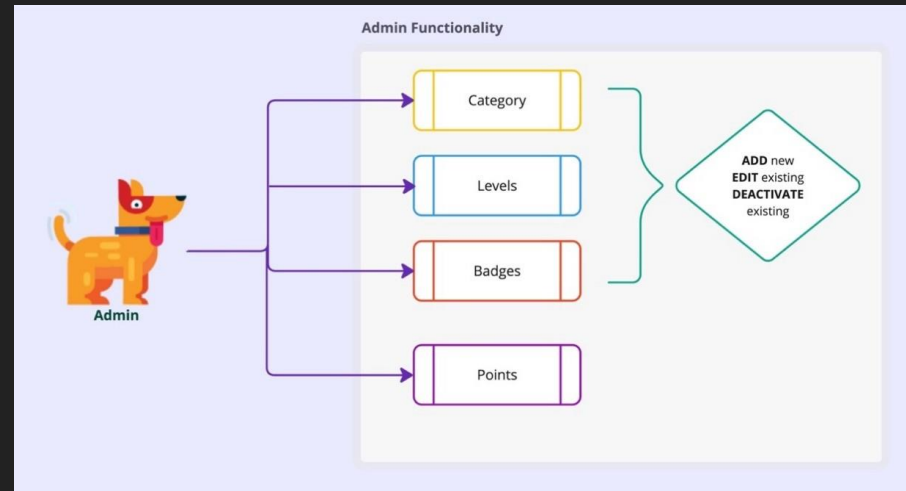
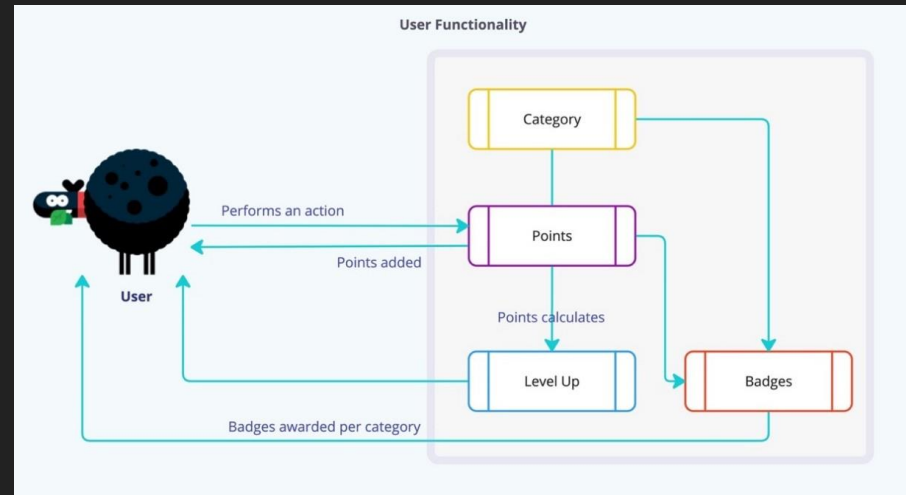
MVP Includes Basic Functionalities:

- 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

The screenshot displays the Gamification Admin Panel interface. The main view shows a user's profile with the following details:

- Level:** Novice
- Rank:** 1/3
- Current Level:** (Progress bar)
- Badges:** 6 (Includes 'First Steps in creating' and 'First Steps in Chatter')
- Number of Points:** Total 19 pts, Creator 11 pts
- Action:** Progressed an Opportunity (1), Created a Chatter Post (4)

On the left, the **Achievements** sidebar includes:

- Leaderboard
- Scoring Rules
- Badges

The **Last Activity Feed** shows:

- Progressed an Opportunity (1) - 4/21/2023, 08:27 PM - +2pts
- Created a Chatter Post (4) - 4/21/2023, 07:15 PM - +4pts
- Created a Chatter Comment (2) - 4/21/2023, 07:15 PM - +2pts
- Created an Opportunity (1) - 4/21/2023, 07:13 PM - +5pts
- Created an Account (2) - 4/21/2023, 07:13 PM - +6pts

Overlaid on the right is a **Communication Wizard** dialog box:

- Level:** Communication Wizard
- Points:** 6/15 pts
- Message:** Keep posting liking and commenting! Good job!
- Status:** This Badge has not been received yet. Keep working in Salesforce and there is no doubt that you will earn it very soon!

At the bottom, an **Actions** table is visible:

Action	Activity Feed Name	Def...	Curr...	Category	Rules	Active
1 Close an Opportunity as Won	Close an Opportunity as Won	5	5	Editor	Unlimited	✓
2 "Close an Opportunity before ""Close date""	"Close an Opportunity before ""Close date""	2	2	Editor	Once p...	✓
3 Complete a Task	Completed a Task	1	1	Editor	Once p...	✓
4 Convert a Lead	Converted a Lead	3	3	Editor	Unlimited	✓
5 Create a Campaign	Created a Campaign	5	5	Creator	Unlimited	✓
6 Create a Case	Created a Case	5	5	Creator	Unlimited	✓
7 Create a Chatter comment	Created a Chatter Comment	1	1	Chatterer	Unlimited	✓
8 Create a Chatter Group	Created a Chatter Group	5	5	Chatterer	Unlimited	✓
9 Create a Chatter Post	Created a Chatter Post	1	1	Chatterer	Unlimited	✓
10 Create a Contact	Created a Contact	3	3	Creator	Unlimited	✓
11 Create a Dashboard	Created a Dashboard	6	6	Reporter	Unlimited	✓
12 Create a Lead	Created a Lead	3	3	Creator	Unlimited	✓

Overlaid at the bottom right is the **+ Add New Level** dialog box:

- Message:** You can upload a JPG, GIF or PNG file. Maximum size is 16 MB. Recommended maximum image size: 1024 px * 1024 px.
- Upload:** Upload Files (Or drop files)
- Fields:** * Level Name, * Points
- Active:** Active
- Buttons:** Cancel, Save

Scoring Page

This is a tab for Gamification Users, where they can easily navigate between the key elements:

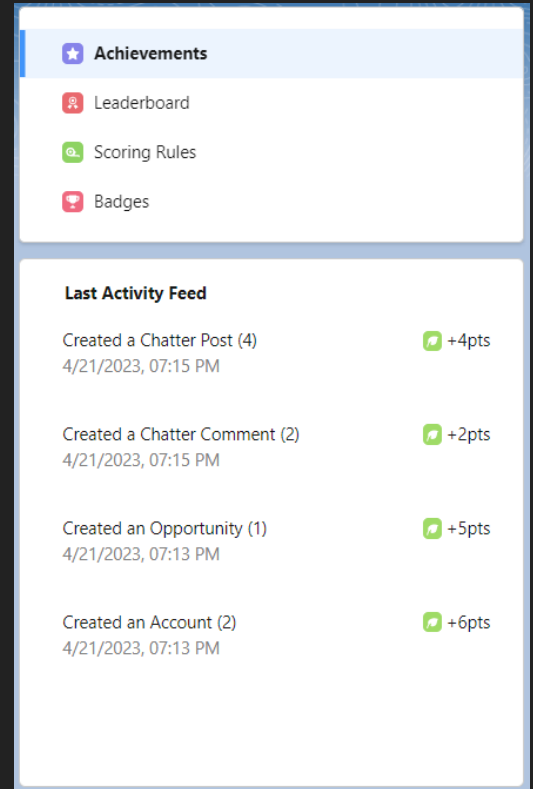
Achievements: keep an eye on their overall progress

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

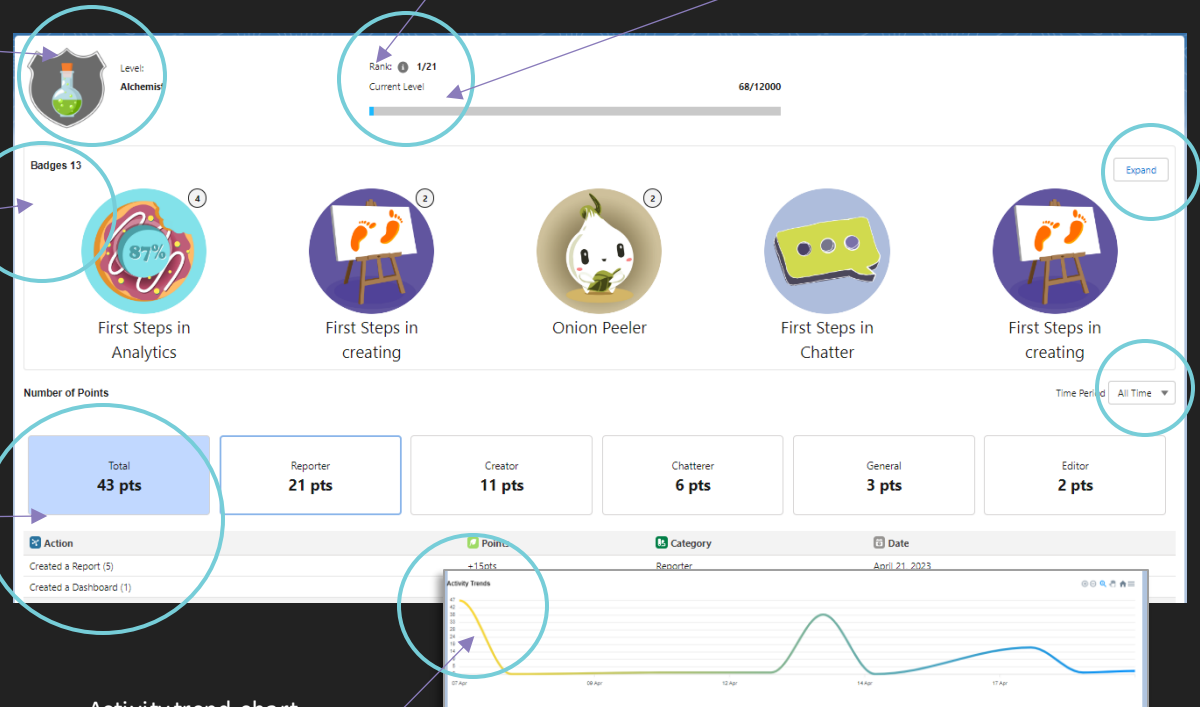
Current level

Earned and WIP Badges

Earned points by Category with ability to drill down

Compare results against others based on the last 30 days activity

Visual representation of Level progress



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

Filters Reset All

Time Period: All Time | Category: Reporter | User Department: Business development | Search: Enter User Name

General Info

My Rank: 10/14
My Points: 25
Average Points: 65

Top Users:

- Jean Weber (Hero) 152 pts
- Alex Smirnof (Adventurer) 128 pts
- David Wang (Alchemist) 98 pts

Rank	Full Name	Level	Points	Badges
1	Jean Weber Business development	Hero	152	+4
2	Alex Smirnof Business development	Adventurer	128	+4
3	David Wang Business development	Alchemist	98	+7
4	Jessica Hansen Business development	Pathfinder	64	+1
5	Gita Devi Business development	Novice	31	

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

Search

Category

Reset

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

List of badges segmented by categories

Ability to drill down to see details

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 ▾

Chatter:

- 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 began. You made it!
- Fantastic Contributor**
11/15 pts

Editor:

- Data Polisher**
2/10 pts
You really like things to be neat! Awesome job!
- First Steps in editing**
1/5 pts

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

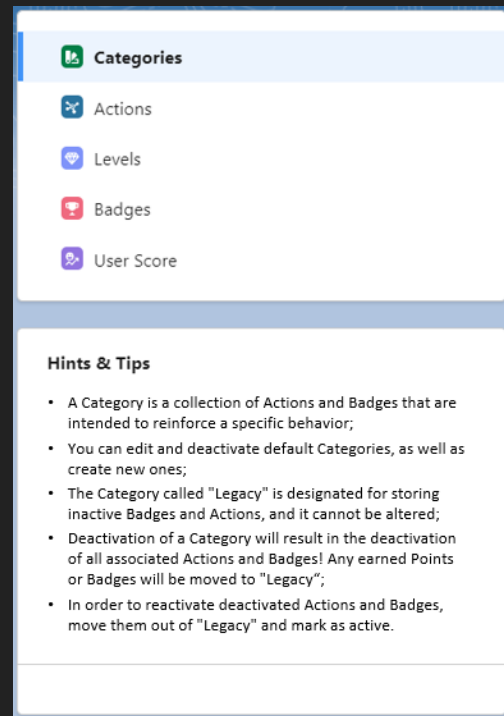
This Badge has not been received yet.
Keep working in Salesforce and there is no doubt that you will earn it very soon!

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**

The screenshot displays the 'Categories' management interface. At the top, there is a search bar labeled 'Search this list..' and a blue '+ Add New' button. Below this is a table with columns for 'Category', 'Description', and 'Active'. The table lists six categories: Chatterer, Creator, Editor, Reporter, General, and Legacy. A modal window titled '+ Add New Category' is open in the foreground, featuring input fields for 'Name' and 'Description', a checked 'Active' checkbox, and a search field for 'Actions'. A blue arrow points from the '+ Add New' button in the main interface to the modal window.

	Category	Description	Active
1	Chatterer	Sharing and collaborating via Chatter	✓
2	Creator	Enriching database with valuable content	✓
3	Editor	Maintaining the data integrity	✓
4	Reporter	Deriving insights via Report and Dashboard	✓
5	General	Everything that doesn't fall into other categories	✓
6	Legacy	Contains badges and actions no longer ob...	✓

+ Add New Category

*Name

Description

Active

Actions
Search...

Cancel Save

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**

The screenshot displays the 'Actions' management interface. At the top, there is a search bar and two buttons: 'Reset Points' and 'Add Action'. Below is a table listing 12 actions. A modal window for adding a new action is overlaid on the table, showing various configuration options.

Action	Activity Feed Name	Def...	Curr...	Category	Rules	Active
1 Close an Opportunity as Won	Close an Opportunity as Won	5	5	Editor	Unlimited	✓
2 "Close an Opportunity before ""Close d...	"Closed an Opportunity before ""Close ...	2	2	Editor	Once p...	✓
3 Complete a Task	Completed a Task	1	1	Editor	Once p...	✓
4 Convert a Lead	Converted a Lead	3	3	Editor	Unlimited	✓
5 Create a Campaign	Created a Cam					
6 Create a Case	Created a Case					
7 Create a Chatter comment	Created a Chat					
8 Create a Chatter Group	Created a Chat					
9 Create a Chatter Post	Created a Chat					
10 Create a Contact	Created a Con					
11 Create a Dashboard	Created a Dash					
12 Create a Lead	Created a Lead					

The '+ Add New Action' modal includes the following sections:

- Action Details:**
 - Name: Type Action Name...
 - Feed Name: Type Executed Action Name...
 - Category: Select Category...
 - Points: Type number of Points to be allocated...
 - Object: Search Object...
 - Type of Action: Select Type of Action...
 - Record Type: Select Record Type...
 - Allocation Rules: Select Allocation Rule...
- Additional Conditions:**
 - Condition Type: N/A
 - Field: Select Field...
 - Operator: Select an Option
 - Value: [Input field]

*a 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

The screenshot displays the 'Levels' management interface. At the top, there is a search bar and an 'Add New' button (circled in red). Below is a table with columns for Icon, Level, Points, and Active status. The table lists 10 levels: Novice, Apprentice, Pathfinder, Adventurer, Alchemist, Centurion, Champion, Hero, Paladin, and Legend. A modal window titled '+ Add New Level' is open, showing a file upload area with the text 'You can upload a JPG, GIF or PNG file. Maximum size is 16 MB. Recommended maximum image size: 1024 px * 1024 px.' and a 'Save' button.

Icon	Level	Points	Active
	Novice	0	<input checked="" type="checkbox"/>
	Apprentice	500	<input checked="" type="checkbox"/>
	Pathfinder	1 500	<input checked="" type="checkbox"/>
	Adventurer		<input type="checkbox"/>
	Alchemist		<input type="checkbox"/>
	Centurion		<input type="checkbox"/>
	Champion		<input type="checkbox"/>
	Hero		<input type="checkbox"/>
	Paladin		<input type="checkbox"/>
	Legend		<input type="checkbox"/>

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**

Badges

Icon	Name	Description	Category	Points	Total Awarded	Active
	Chatter User	Keep it up with Chatter posting! You rule!	Chatterer	10	0	<input checked="" type="checkbox"/>
	Communication Wizard	Keep posting liking and commenting! Good job!	Chatterer			<input checked="" type="checkbox"/>
	Content Master	Your contribution is invaluable! Keep going!	Creator			<input checked="" type="checkbox"/>
	Data Diver	Isn't it fun to dive into data looking for something speci...	Reporter			<input checked="" type="checkbox"/>
	Data Polisher	You really like things to be neat! Awesome job!	Editor			<input checked="" type="checkbox"/>
	Fantastic Contributor	You are doing great by adding so much valuable content.	Creator			<input checked="" type="checkbox"/>
	First Steps in Analytics	With right reports data is not just data but insights! Way...	Reporter			<input checked="" type="checkbox"/>
	First Steps in Chatter	You just learned how to use Chatter! Keep going!	Chatterer			<input checked="" type="checkbox"/>
	First Steps in creating	A long journey begins with a single step. You made it!	Creator			<input checked="" type="checkbox"/>
	First Steps in editing	You just made your first changes. Keep going!	Editor			<input checked="" type="checkbox"/>
	Moonshot Thinker	Your imagination has no limits.	General			<input checked="" type="checkbox"/>
	Onion Peeler	Great job in uncovering insights layer by layer!	Reporter			<input checked="" type="checkbox"/>
	Quality Upholder	The neater the records the better insights! Well done!	Editor			<input checked="" type="checkbox"/>

+ Add New Badge

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

* Name

Description

* Category
Select Category

* Points

Active

Cancel Save

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.

User Score

Select User:

Pavel Kazeyeu

Level: **Alchemist**

Rank: **1/21**
Current Level: **68/12000**

Badges 13 Expand

- First Steps in Analytics** (4)
- First Steps in creating** (2)
- Onion Peeler** (2)
- First Steps in Chatter** (2)
- First Steps in creating** (2)

Number of Points Time Period: All Time

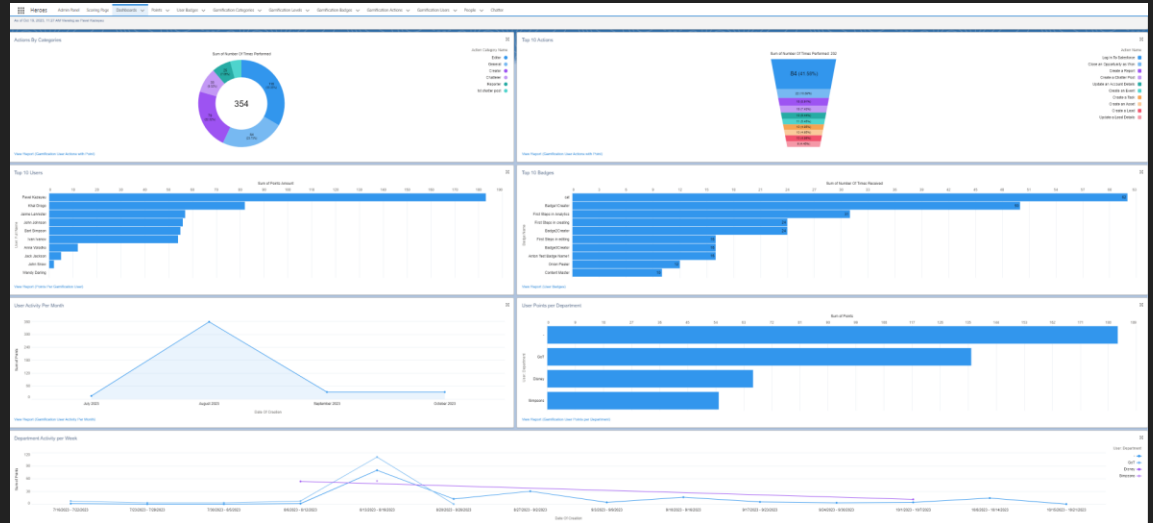
Total 43 pts	Reporter 21 pts	Creator 11 pts	Chatterer 6 pts	General 3 pts	Editor 2 pts
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Action	Points	Category	Date
Logged in to Salesforce (1)	+1pts	General	April 25, 2023
Logged in to Salesforce (1)	+1pts	General	April 25, 2023

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

A collection of whimsical, handcrafted puppets and figures on wooden shelves. The puppets have large, expressive eyes and various colors and textures. One prominent puppet has a large, bushy green head. Another has a grey, textured body with a small face. The background is dark, making the puppets stand out. The text "Thank You!" is overlaid in a light blue, sans-serif font.

Thank You!