



Skilljar's Salesforce Integration 101



Managed through Salesforce's AppExchange, Skilljar's Salesforce integration feeds your customer training data directly into your existing Salesforce CRM account, in near real time, with minimal setup. With a comprehensive list of 40 custom objects, as well as the ability to create connections with your other business systems of record, the Skilljar Salesforce integration delivers a holistic, single source of truth for your customer data.

Customer Education data is powerful in its own right, but it can be even more impactful when it is integrated with your other business systems - from your CRM and marketing automation tools to your sales software and content creation platform. Not only do these integrations enable a holistic view of your training program's impact, the insights that they generate can also provide the foundation for strategic, data-driven actions that improve product adoption and customer health.

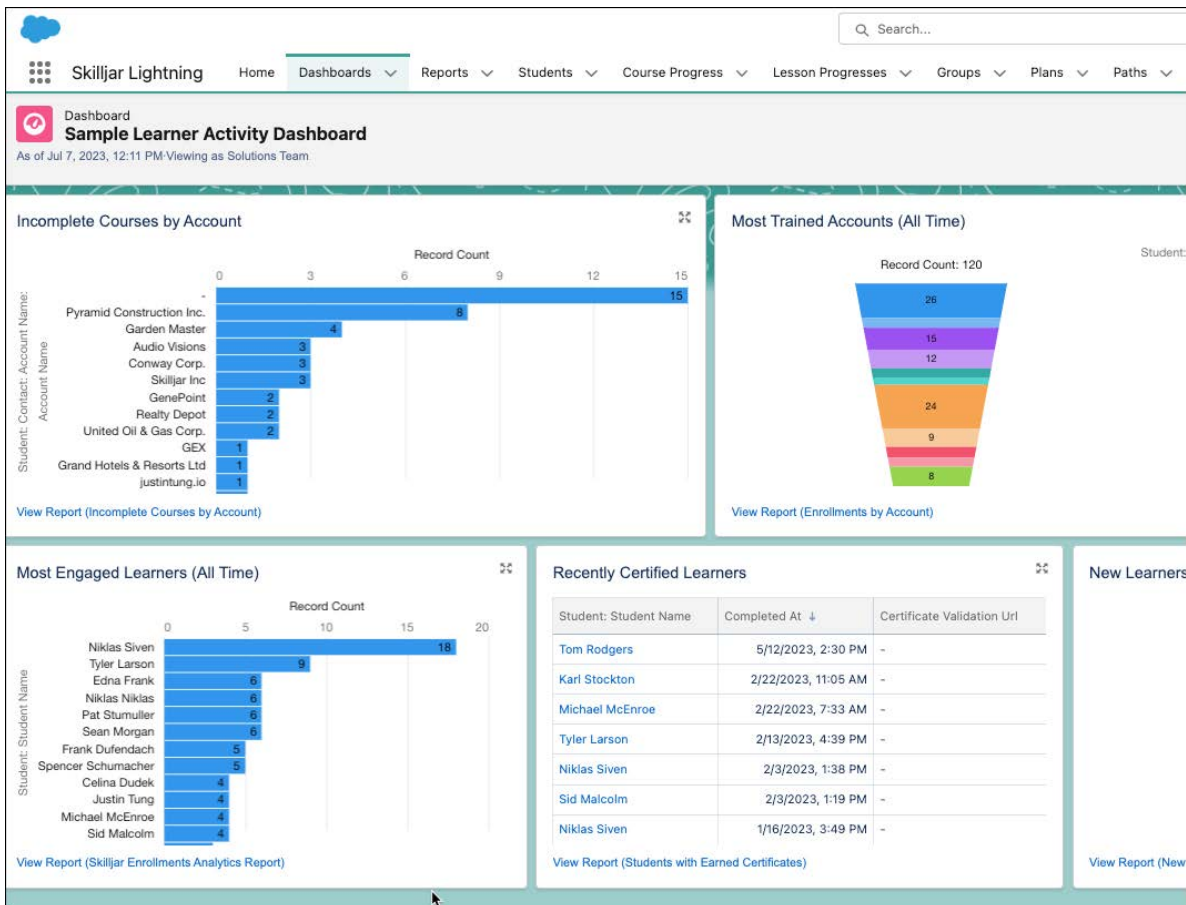
The Salesforce CRM is a market-leading platform that, when integrated with Skilljar's Customer Education platform, can enable companies to measure the efficacy of their training programs. This integration empowers companies that use both Salesforce and Skilljar to view real-time training data in context, build consolidated reporting dashboards, and trigger smooth training workflows - all from directly within Salesforce. Setup is simple and requires minimal lift as Skilljar has a free native app on the Salesforce AppExchange that can be installed in minutes to initiate the streaming of training data.

Common Use Cases

With Skilljar's Salesforce integration, we've made the process of sending student interaction data to the Salesforce platform seamless for our customers. Common Salesforce use cases include:

- Building reports to show training consumption impact on important account-based business metrics such as expansion, churn, customer success score, and support tickets submitted

- Building consolidated Salesforce dashboards for Customer Success representatives and admins to quickly view training details such as percentage complete or who is certified
- Adding training data to customer success software like Gainsight
- Automatically adding training data to Salesforce contact records
- Sending signup fields (e.g. job title, company name) into Salesforce to more easily build and segment reports
- Sending signup fields into Salesforce to write custom SFDC business logic to link Skilljar data to native Salesforce data
- Generating leads from training content by automatically capturing user sign ups into Salesforce and then sharing with Sales Team representatives as Opportunities
- Building complex onboarding, nurture, and re-engagement campaigns with marketing software to promote the most relevant training materials at the opportune time



Salesforce Custom Objects

Skilljar's Salesforce integration offers a comprehensive list of **40 custom objects** within Salesforce. The data associated with these objects can be added to an existing Salesforce record or used to create a new record if one doesn't already exist. All fields are updated in real-time, and include:

- Skilljar Student (with a Skilljar ID and email address)
- Published Courses (with URL, domain, and title)
- Purchase information (Price, Currency, Promo Code)
- Enrolled At timestamp
- Latest Activity timestamp
- Number of completed lessons
- Number of total lessons in the course
- Completed At timestamp
- Success Status (Passed or Failed)
- Course Score
- Maximum Course Score
- Credits Earned
- Credit Units (e.g. Points, Hours)
- Certificate URL

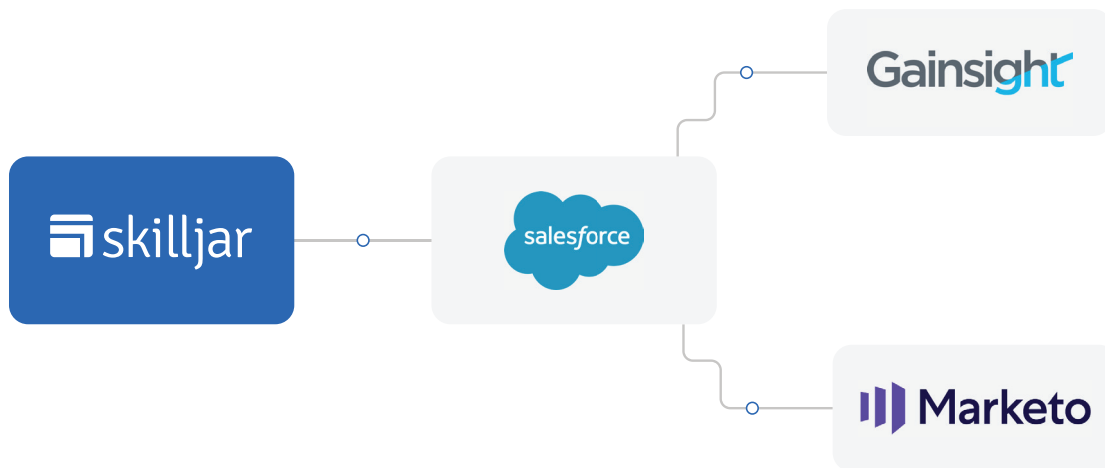
Secure & Certified

Since Skilljar's Salesforce Application is managed through the [Salesforce AppExchange](#) store, Salesforce natively takes care of the API key exchanges, data visibility, and data integrity behind the scenes - protecting end user data on both ends.

Once you have authenticated and connected your Skilljar and Salesforce platforms, new enrollments, course progress, or any other data captured by our integration will begin flowing immediately into Salesforce.

Skilljar - Salesforce Integration with Additional Business Tools

Skilljar's Salesforce Integration can also connect with your other business systems of record for multi-level data sharing. Once your Skilljar data is streaming into your Salesforce instance, it now becomes readily available for use in any other system that offers a Salesforce connector.



Marketing Automation

As students create new accounts to engage with training resources, those accounts are automatically shared with Salesforce. If they are not tied to an existing customer, you've now surfaced new leads that can then be isolated in your marketing automation tools like Marketo and Pardot for highly tailored outreach.

In partnership with your Marketing Team, you can also create onboarding, nurture, re-engagement, and other campaigns based on users' progress with your training program. Because that data is streamed into Salesforce at a highly granular level - including fields like job title and company name - your team can also set up trigger-based, automated email communications that enable the distribution of the relevant campaign materials.

Tools we support include:

- Marketo
- Pardot
- HubSpot

Customer Success

By integrating Skilljar's customer training platform with Customer Success tools like Gainsight and Zendesk, businesses can leverage customer training and support data to drive powerful insights about customer health and product adoption. Using Skilljar in conjunction with these tools enables enterprises to measure time-to-value, incorporate educational touch points, and evaluate customer onboarding with a more complete picture of the customer journey.

Tools we support include:

- Gainsight
- Zendesk

Data Visualization

Create custom reports and dashboards to visualize training data alongside other business metrics like account revenue, industry, and customer segment.

Tools we support include:

- Tableau
- Looker
- Power BI

eCommerce

For those monetizing their Customer Education programs, the Skilljar Salesforce integration provides insight into training revenue per account, enabling targeted outreach for renewals and expansions.

Tools we support include:

- PayPal
- Stripe
- Merchant e-Solutions

For more information about Skilljar's Salesforce integration, please reach out to sales@skilljar.com

About Skilljar

Skilljar's award-winning customer training platform enables you to successfully onboard, engage, and retain your customers and partners. Our cloud learning management system (LMS) makes it easy to create courses, distribute to web and mobile devices, and track results.

Skilljar helps you accelerate product adoption, automate onboarding workflows, reduce support costs, and increase long-term customer satisfaction.



[Request a Demo](#)

