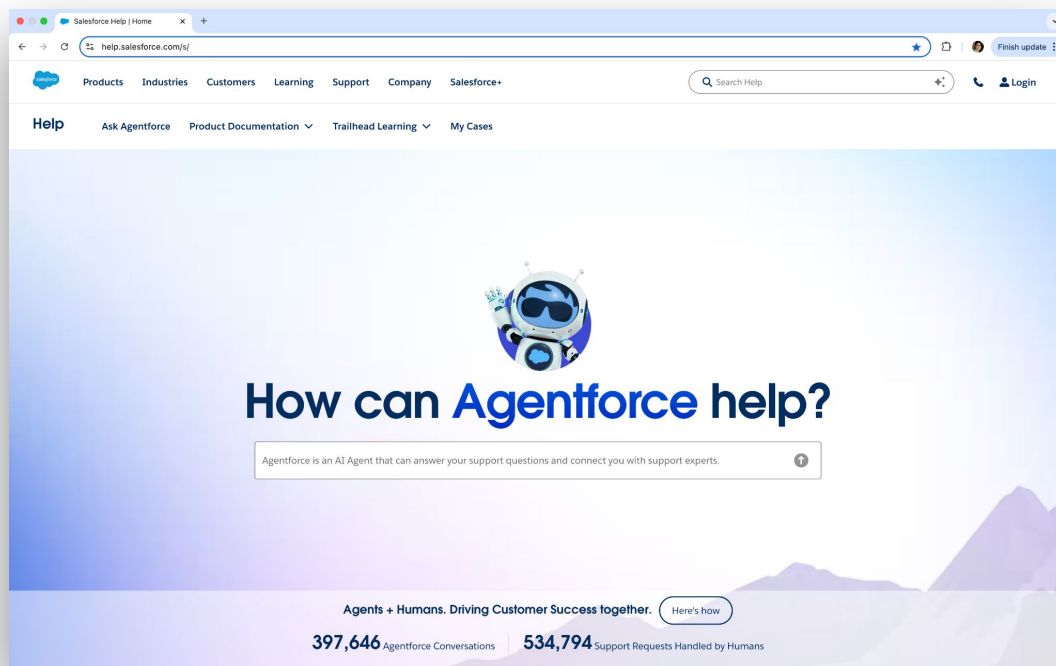


# Impact Story:

## *Help.Salesforce.com*



# My Part

## As an Individual

- Understand the technology
- Have an informed opinion
- Improve the E2E user experience any way I can
- Breadth AND depth

## As a People Leader

- Empower Messaging Lead Designer
- Unblock the critical path
- Check titles at the door; work as coalition in partnership
- People AND product

## As a Enterprise Influencer

- Unblock the critical path
- Communicate up, down & sideways
- Find the smartest people & empower them
- Forge partnerships
- Executive summary & escalation

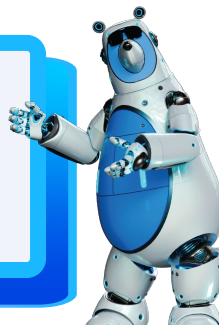
# The Project

*Our Leadership's Ask:*

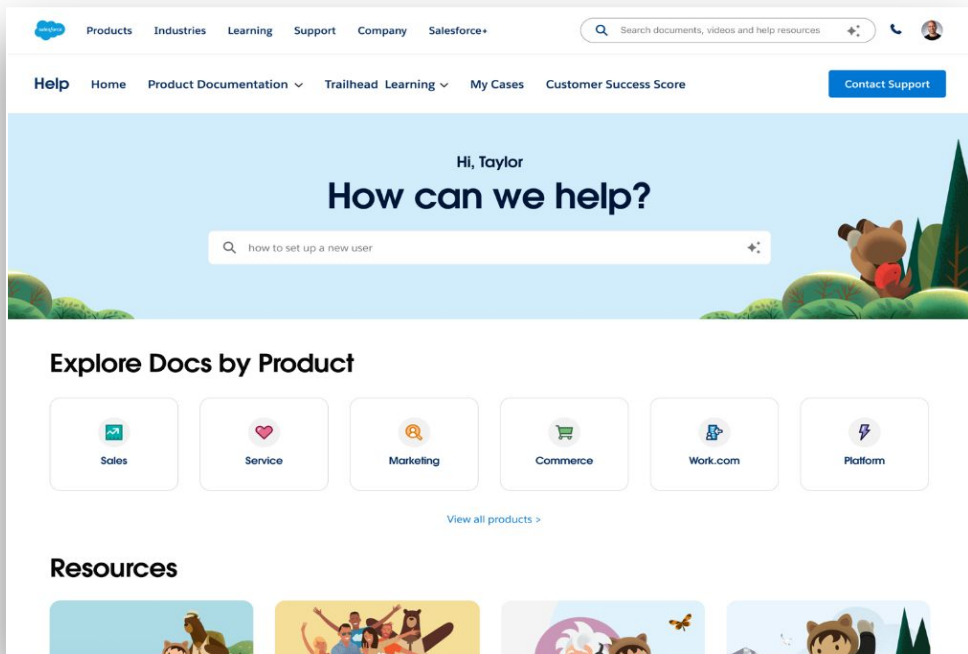
*Integrate Agentforce into Salesforce Help AND make self-service easier for customers experiencing an issue*

*Leadership gave us clear parameters: Redesign the UI & Prioritize Customer Zero*

**And you've got 5 days!**



# Our Starting Point: *Salesforce Help*



## Customers come to Help:

Looking for information

**60M** Visits per year

Sifting through content

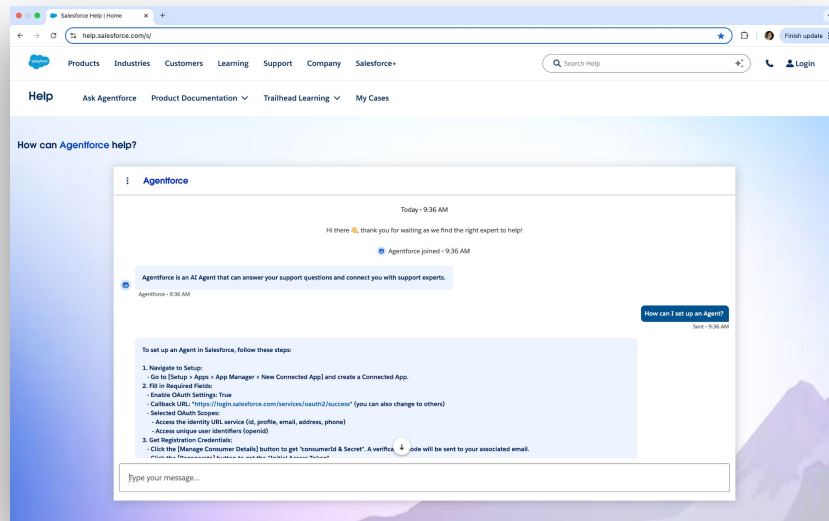
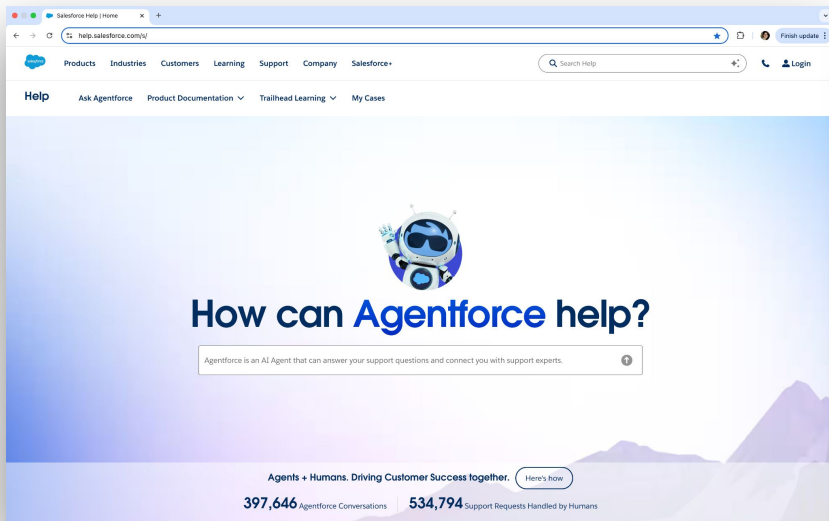
**755K** Support articles

Seeking to talk to human

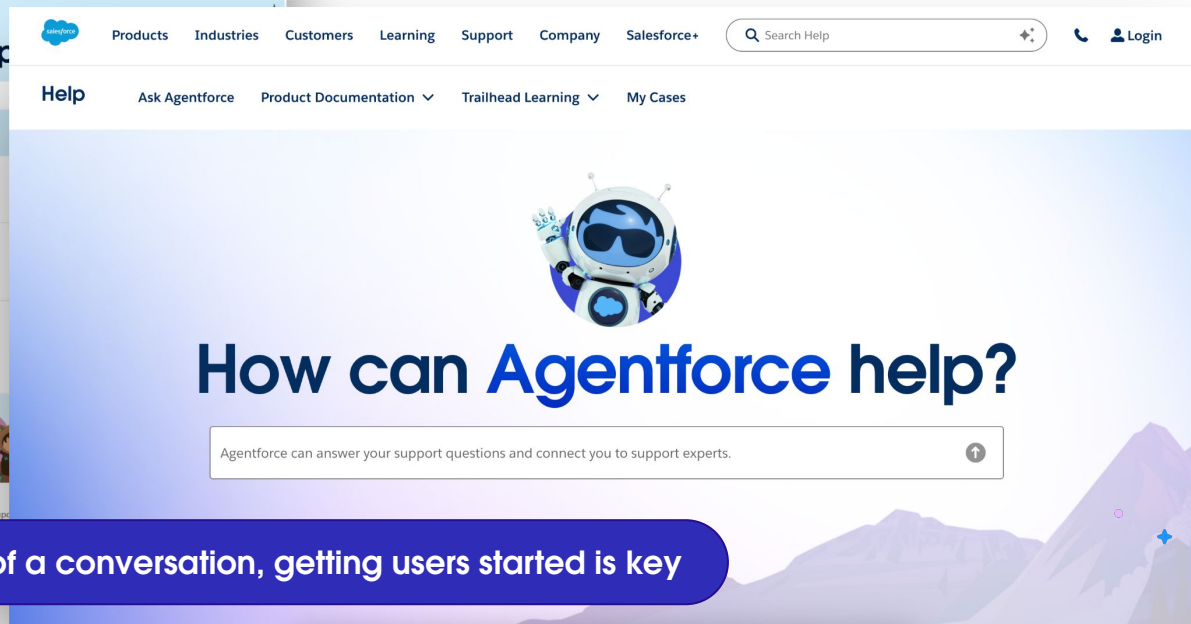
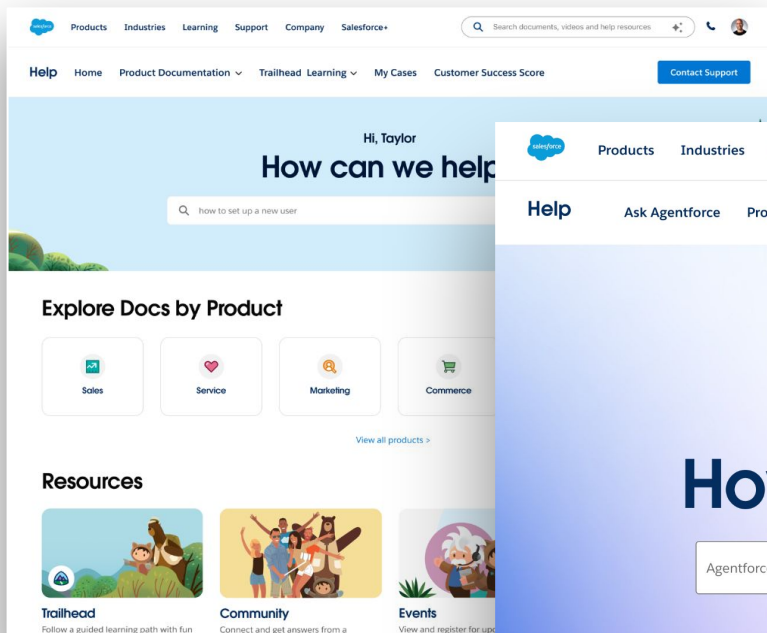
**2M** Support cases are created every year

Traditional support portals make customers work too hard to find solutions

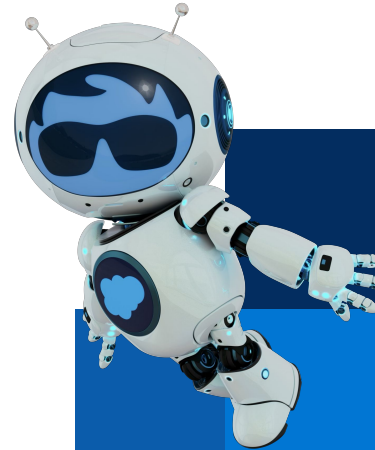
# The Outcome: *Agentforce Powered by Digital Engagement*



# From Navigation to Conversation

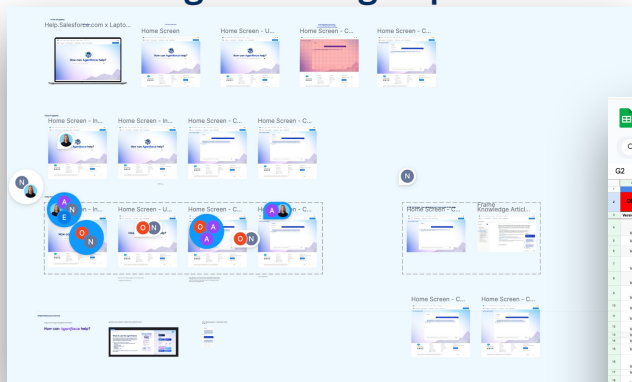


# From Siloed Specialist to Cross-Functional Coalition



# From Robust Overhead to Tooling Simplicity

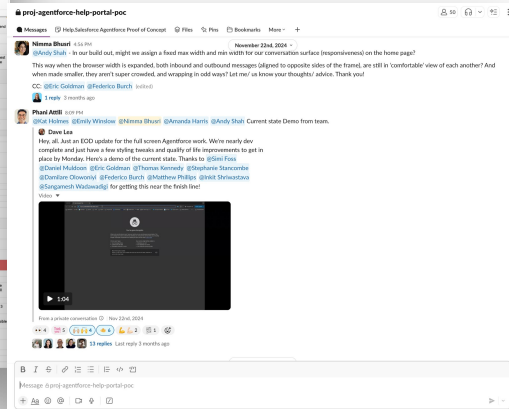
Figma - Design Spec



Google Sheets -  
Feature Prioritization

A screenshot of a Google Sheet titled "Chat x Help Prioritization". The sheet contains a table with columns for "Item", "Priority", "Status", "Owner", "Due Date", and "Comments". The table lists various features and tasks, such as "Implement effective 'IMMEDIATELY' release for", "Implement effective 'MAYBE' release for", and "Implement effective 'NEVER' release for". The table is organized into sections for "IMMEDIATELY", "MAYBE", and "NEVER" releases, with rows detailing specific features and their priorities. The sheet also includes a sidebar with a "Menus" section and a "Tools" section.

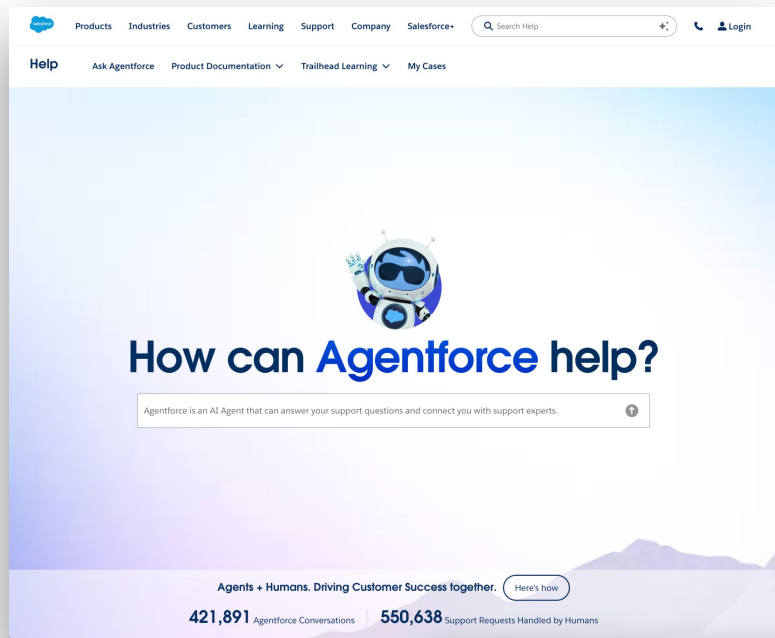
Slack - Our  
Everything Place



Keep tooling simple & focused on the utility for the team



# From Building Features to Delivering Outcomes



What do users need to be successful?

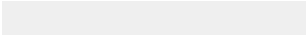
What does data tell us about their patterns?

What warrants keeping?

By simplifying the experience, we make space for the user to focus on the core tasks:

Finding information

Resolving issues



# Learning

## Meet the Moment

- Agentforce is BIG and NOW
- Set teams up for success
- Scope what we can & adapt

## Customer “o”

- IS a Customer
- User Success IS Customer Success
- Is our partner
- Includes many teams

## Check Egos

- Sometimes we just need to deliver
- Work in partnership
- Relationships & kindness helps when things get hard

## More Comms

- Communicate. Repeat.
  - Don't take it personal; everyone is doing their best
  - How might we improve
- 