



# ExpertusONE Salesforce Connector

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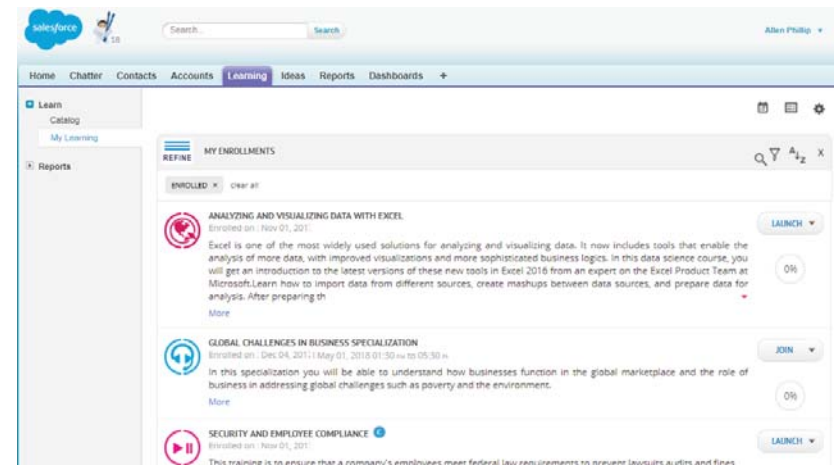
# Overview

Leveraging the ExpertusONE API framework, ExpertusONE provides an innovative, complete integration approach to the Salesforce.com CRM. Thus, customers are able to take full advantage of an API-based integration between the two platforms to see immediate value in three primary areas: sales enablement, reporting and workflow automation.

## Three Areas of Value

- 1 Sales Enablement** – Salesforce.com users can fully interact and use ExpertusONE natively inside their Salesforce.com setup. Using a unique Expertus-built, Canvas-based user interface (UI), the user experience is seamless promoting immediate user adoption. Since Salesforce.com users can take training, see transcripts, watch videos and enroll in new classes from Salesforce.com, there's no need to use or learn a new training system. This integration app also leverages all of the native, profile-based innovation in ExpertusONE, providing recommendations, highlighting mandatory/compliance activities and incorporating social components already utilized by sales today. It's sales enablement in its most innovative form.
- 2 Reporting** – Salesforce.com customers can enable a data sync with ExpertusONE, which allows any training history and essential data inside ExpertusONE to live within Salesforce.com custom objects. The data can be presented to users within different views, such as 'Contacts' and 'Leads', as well as built into their reports. The combined data provides enhanced insight into training for salespeople, customers and partner users, all of which has an immediate impact on improved sales performance.

- 3 Workflow Automation** – Expanding on the use of REST APIs published by both platforms, ExpertusONE customers can utilize the data inside Salesforce.com to provide SSO support, as well as automate meaningful and value-added workflows. Common use cases include user creation and management, creating opportunities in Salesforce.com based on eCommerce orders in ExpertusONE and creating a training recommendation engine based on Salesforce.com profile data.



## Unique Multi-tenancy Design

Expertus has taken an innovative approach to provide a seamless, technical integration that utilizes Force.com Canvas and published REST APIs. This enables ExpertusONE customers to serve multiple audiences and use cases in a single LMS and CRM platform.

By taking advantage of ExpertusONE's underlying, next-gen technology and Salesforce.com's Canvas feature, customers are not restricted to providing access just to the LMS in a single environment. And this means that customers can make their learning accessible from multiple environments:

- Partners using Salesforce.com Communities
- Employees directly within ExpertusONE
- Salesforce.com users directly inside Salesforce.com

This greatly expands the value of their ExpertusONE LMS platform and, again, drives sales training consumption and overall productivity.

## Technology

With its comprehensive integration approach, ExpertusONE utilizes several technologies to provide customers with a predictable, stable integration with Salesforce.com. However, the true innovation comes from a unique “point of least resistance” approach, providing full access to training and data, regardless of the entry point or device.

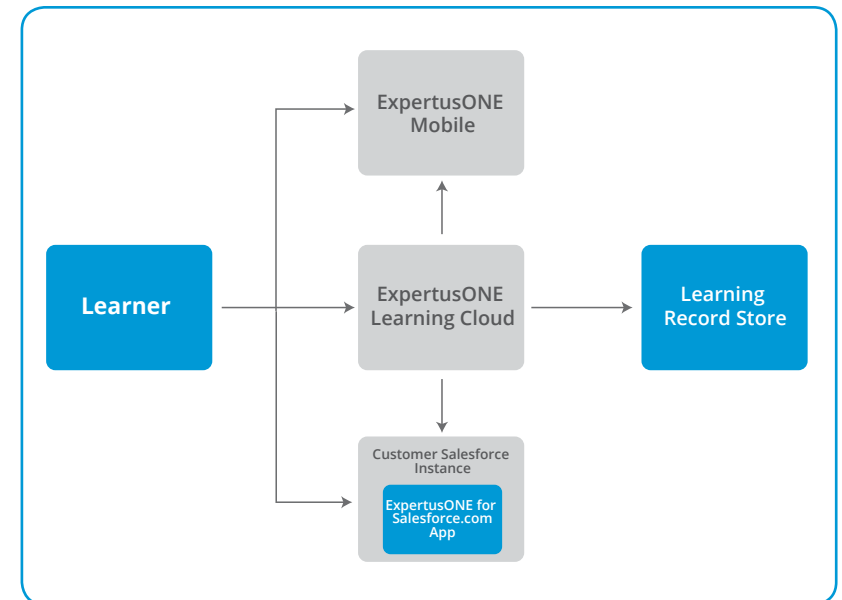
- 1 **Canvas-based UI Integration** – Leveraging Salesforce.com's unique UI feature, Expertus has pre-built an integration app that allows for direct access to ExpertusONE's learner views inside the CRM. So, users in the CRM simply choose the 'Learning' tab (which can be renamed), at which point they are authenticated behind the scenes into ExpertusONE. New users will be automatically created in ExpertusONE, and their data, in turn, will be pulled into the Salesforce.com UI.

**2 Mobile** – ExpertusONE users can access the same training catalog and enrollments found directly in ExpertusONE and from the Salesforce.com app via ExpertusONE Mobile. This robust, best-of-breed mobile app is defining what learning on-the-go means today. To learn more visit: <http://www.expertus.com/expertus-one/mobile/>.

**3 ExpertusONE Learning Cloud** – One significant advantage of ExpertusONE is the ability to access all training directly through:

- A browser on a laptop or desktop,
- A mobile app or mobile browser and
- Directly via Salesforce.com.

## Access Learning at the Point of Least Resistance



## Sales Enablement Use Cases

<b>Sales Rep</b>	Salesperson has to take new product introduction/update training	<p>The salesperson's 'My Learning' page displays inside his/her Salesforce.com application. He/she can then:</p> <ul style="list-style-type: none"> <li>• View current and completed training</li> <li>• Launch WBTs, join virtual/webinar classes and view videos</li> <li>• Rate, share and complete surveys/assessments directly from Salesforce.com</li> </ul>
<b>Sales Manager</b>	Sales manager does a ride along with a rep and decides the rep needs additional training	<p>The manager assigns training to the rep, then:</p> <ul style="list-style-type: none"> <li>• The rep sees the new training show up in his/her Salesforce.com 'My Learning' tab</li> <li>• He/she launches and completes the training</li> <li>• He/she then participates in discussion forums to enhance knowledge and understanding</li> <li>• The rep's manager is notified that the training is complete</li> </ul>
<b>Account Manager</b>	A territory account manager responsible for all partner training needs to ensure partners, at various levels, are compliant with their training needs	<p>The territory account manager simply views training completed by individual partners/partner companies inside Salesforce.com.</p>

## Data Level & Workflow Automation Integration Use Cases

### 1 ExpertusONE training history custom object in Salesforce.com

With a custom object inside Salesforce.com, ExpertusONE training history data can be called into Salesforce.com on a real-time or scheduled basis. There are numerous deployment options for utilizing this data inside Salesforce.com. Common use cases include:

- Sales manager can view an employee's training history inside the CRM
- Channel manager can see the certification progress of new a partner
- Account manager can see the training progress of a customer coming up for renewal

### 2 Profile change in CRM initiates course assignment in ExpertusONE

As a user's profile in the CRM changes, whether they are an employee, contact or lead, this data can be sent to ExpertusONE to initiate assignment and entitlement workflows. Following is a common use case:

- A salesperson is promoted and starts selling a different product line requiring a new product certification
- The user's profile in the Salesforce.com CRM is updated to show the changed role, and that data is synced with ExpertusONE
- A certification enrollment notification (email/SMS) is sent to the salesperson
- The next time he/she logs into ExpertusONE, his/her new certification shows on the 'My Learning' page as 'Mandatory'



### 3 Simplifying eCommerce order management

For customers using ExpertusONE to manage their training business, ExpertusONE can communicate directly with the Salesforce.com CRM to simplify order management. One use case includes the ability to send completed orders from ExpertusONE to Salesforce.com on a real-time or scheduled basis. The orders can then be used to create opportunities in the CRM, notify account reps, create cases and update revenue commission reports.

### 4 Streamlining user record management

In support of streamlined user record management, ExpertusONE can defer the account creation process to Salesforce.com. An example of this is:

- When a user comes to ExpertusONE to sign up for training, and they do not have an account, the user clicks on 'Register'
- This process then calls Salesforce.com and, potentially, a web-to-case form

- The user completes the form, which creates a case and lead in Salesforce.com, notifying the appropriate people
- Once approved, Salesforce.com will call the ExpertusONE 'Create User' API and use the data from the CRM
- ExpertusONE will generate notifications to the end-user and provide catalog access based on the user's profile

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