Expert Coaching (Accelerators) Catalog

Expert Coaching includes targeted, outcome-based sessions that cover a range of topics from getting started to governance. This catalog includes links to three types of Expert Coaching: webinar sessions, individual sessions, and videos. Find your product, explore the available resources, and grow your skills with Salesforce experts.

Select a Product

- Sales
- Service
- Marketing
- Commerce
- Pardot
- Experience
- Platform
- Tableau CRM
- Heroku
- Salesforce Industries
- Governance
- Salesforce Mobile
- Salesforce CPQ
- Salesforce.org
- Work.com

Learn More

- Get Help Booking an Individual Session
- Register for an Upcoming Session
- Get to Know Success Plans

Customers with Premier and Signature Success Plans can schedule individual sessions at no additional cost. For more info, get to know our Success Plans.
What’s an Expert Coaching Session?

Take your success to the next level

Expert Coaching Sessions are specialized engagements designed to help you get more value from Salesforce products. We currently offer:

- **Recorded Expert Coaching Sessions**
  - Videos
  - That give you the flexibility to learn at your own pace and on your own schedule. Available to all customers.

- **One-hour engagements on a specific topic**
  - Webinar Sessions
  - Available to Premier and Signature Success Plan customers.

- **Personalized sessions with Salesforce experts**
  - Individual Sessions
  - To help you overcome obstacles and drive long-term success. Available to Premier and Signature Success Plan customers.

Premier and Signature Success Plan customers can request an individual follow-up session after attending a webinar or viewing a video.
Did you know? Most of our Expert Coaching webinars are also available via video, so you can get the Salesforce expertise you need—when you need it—on your schedule.
Ask an Expert Office Hours

Talk with Salesforce experts and learn from your peers. Join us as we answer adoption, best-practice, and how-to questions live! Available to Premier and Signature Success Plan customers.

Register for a Session

Topics

- Ask a B2C Commerce Cloud Expert
- Ask a Tableau CRM Expert
- Ask a Lightning-Transition Expert
- Ask a Marketing Cloud Expert
- Ask a Maps Expert
- Ask a Pardot Expert
- Ask a Social Studio Expert
- Ask a Sales Cloud Expert
- Ask a Service Cloud Expert
- Ask a Salesforce CPQ Expert
- Ask an Experience Cloud Expert
- Experience Cloud: Show Me How
- Ask the Expert - MFA Guidance
- Ask a Change Management Expert
- Ask a Governance Expert
- Ask an Expert: Vision & Strategy
Premier Success Plan

Get the most out of your Salesforce technology with specialized guidance

- Realize value from day one
- Deploy new innovations and capabilities with confidence
- Boost productivity and keep your vision on track

Register for the Getting Started: Premier Success Plan webinar.
Sales

Getting Started
- Admin Basics
- Admin Fast Start
- Campaign Management
- Considerations for Accounts and Contacts
- High Velocity Sales
- Sales Cloud Einstein
- Salesforce Maps Fast Start
- Set Up Einstein Activity Capture
- Set Up myTrailhead
- Set Your Implementation Up for Success

How To
- Console Design
- Get the Most out of Enterprise Territory Management
- Get the Most out of Forecasting
- Improve Efficiencies with Key Lightning Features
- Managing Activities in Lightning
- Manage Leads
- Prevent Duplicate Records
- Salesforce Maps: Layer Creation
- Set Up and Keep Track of Opportunities
- Set Up Gmail Integration
- Set Up Gmail Integration with Inbox
- Set Up Home Page
- Set Up Lead or Opportunity Workspace
- Set Up Outlook Integration
- Set Up Outlook Integration with Inbox
- Set Up Path in Lightning

Insights
- Activity Dashboards
- Design Reports & Dashboards
- Level Up Your Reports and Dashboards
- Opportunity Management for Products and Price Books

Webinar Session and Video • Video • Individual Session

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Service

Getting Started
- Agent Productivity Features
- Chat for Lightning
- Digital Engagement
- Einstein Bots
- Einstein Case Classification and Next Best Actions
- Field Service: Lightning
- Service Cloud: Lightning
- Service Cloud: Voice

How To
- Automate Your Case Management
- Automate Work Distribution With Omni-Channel
- Design Your Lightning Console
- Deploy Chat
- Deploy Messaging
- Einstein Bots NLP Tuning
- Plan “Salesforce Knowledge” in Lightning
- Plan Your CTI Implementation
- Plan Your Lightning Knowledge Transition
- Set Up Entitlements & Milestones

Insights
- Dashboard Design
- Dashboards Fast Start

Review
- Lightning Transition Readiness

Webinar Session and Video  Video  Individual Session
Getting Started

- Admin + Deliverability
- Advertising Studio
- Building, Testing, and Sending Email
- Data and Segmentation Basics
- Design & Strategy for Email Marketing
- Email Studio: Email Personalization Basics
- Interaction Studio: Prepare for Implementation
- Journey Builder: Journey Strategy
- Multi-Factor Authentication
- Social Studio
- Social Studio: Social Listening

How To

- Audience Studio: Uncover Audience Insights
- Automate Data Imports
- Email Studio: Automate Email Segmentation
- Journey Builder: Set Up a Journey
- Manage Your Data and Contacts
- Social Studio: Set Up Social Studio Automate
- Use Einstein Engagement Scoring
- Use Marketing Cloud Connect

Insights

- Email Reporting and Tracking

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Getting Started

- Einstein Product Recommendations [B2C]
- Metrics and Analytics [B2B]
- Metrics and Analytics [B2C]
- Multi-Factor Authentication [B2C]
- Onsite Marketing and Promotions [B2C]
- Onsite Search [B2C]
- Page Designer [B2C]
- Products and Catalogs [B2C]
- Search Engine Optimization (SEO) [B2C]
- Sorting Rules [B2C]

How To

- Organize Your Teams [B2B]

Insights

- Feature Adoption Checklist [B2C]

Review

- Einstein for Commerce [B2C]
- Onsite Search [B2C]
Getting Started
- Empower Your Sales Users
- Google Organic Basics
- New Admin Onboarding
- Prepare for Implementation
- Switching to Pardot Lightning App

How To
- Email Marketing Strategy
- Integrate with Google Ads and Analytics
- Manage Leads
- Send List Emails
- Use Automation Tools
- Use Forms and Landing Pages
- Use Engagement Studio
- Use Salesforce Campaigns
- Use Salesforce Engage

Insights
- B2B Marketing Analytics
- B2B Marketing Analytics
- Reporting

Advanced
- Global Marketing Strategy

Review
- Database Hygiene Assessment
- Health
- Optimize Your Pardot and Salesforce Integration
Experience

Getting Started
- Self-Service Experience Fast Start
- PRM Portal Fast Start

How To
- Build a Self-Service Experience Site
- Build a PRM Portal
- Create a Public Knowledge Base
- Define Your Member Journey
- Plan Your Chatter Adoption

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Platform

Getting Started
- Application Security
- Data Modeling 101
- Lightning Configuration and Customization
- Multi-Factor Authentication
- Salesforce Flow
- Set Up Lightning Scheduler

How To
- App Development with Salesforce DX
- Back Up and Manage Salesforce Data
- Business Process Automation
- Design and Integration Tools
- Manage the Salesforce Development Lifecycle
- Plan Your Chatter Adoption**
- Salesforce Shield
- Sandbox Design
- Set Up Single Sign-On

Review
- Improve Adoption
- Lightning Platform: Readiness Assessment
- Org Health
- Salesforce Data Quality
- Security Maturity Assessment

** Also appears in the Experience Cloud section.
Note: Einstein Analytics has a new name. Say hello to Tableau CRM. Everything about how it works stays the same. Tableau CRM offers the best experience for native analytics inside Salesforce CRM products. It continues to combine artificial intelligence (AI) and business intelligence (BI), and Einstein Discovery continues to have tight integration with the platform. You’ll see the old name in a few places as we work through the updates.
Salesforce Industries

Getting Started
- OmniStudio

Insights
- Development Lifecycle Recommendations
Industries | Health Cloud

Getting Started
- Health Cloud
- Planning Your Implementation

How To
- Referrals & Provider Relationship Management

Webinar Session and Video  Video  Individual Session
Industries | Financial Services Cloud

Getting Started

- Financial Services
Governance

Getting Started
- Governance
- Change Management
- Vision and Strategy

How To
- Design a Salesforce Org Strategy

Review
- Salesforce Maturity Assessment
Salesforce Mobile

Getting Started
- Platform Fast Start

How To
- Improve Adoption
Salesforce CPQ

Getting Started
- Pricing
- Salesforce CPQ

How To
- Build a Bundle
- Create a Product Catalog
- Guided Selling
- Manage Renewals and Amendments
- Set Up Advanced Approvals
- Use Price Rules
- Use Product Rules
- Use Quote Templates

Webinar Session and Video
Video
Individual Session

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Getting Started
- Case Management for Human Services
- Contact and Household Management in NPSP
- Contact and Household Management in NPSP
- Essential Admin Skills for Nonprofits
- Nonprofit Success Pack (NPSP) for Fundraising
- Nonprofit Cloud for Program Management
- Welcome to Premier for Nonprofit Cloud
- Volunteers for Salesforce

How To
- Get Your Data into Nonprofit Success Pack (NPSP)
- Prevent Duplicates in Nonprofit Success Pack (NPSP)
- Set Up Campaigns for Nonprofit Fundraising
- Set Up Levels and Engagement Plans in Nonprofit Success Pack (NPSP)
- Track Income in Nonprofit Success Pack (NPSP)
- Track Soft Credits in Nonprofit Success Pack (NPSP)
- Use Email Functionality to Engage Nonprofit Constituents

Insights
- Reports and Dashboards in Nonprofit Success Pack (NPSP)
Salesforce.org | Education Cloud

Getting Started
- Education Data Architecture (EDA)
- Governance in Higher Education
- Using Advisor Link
- Welcome to Premier for Education Cloud

How To
- Develop a Digital Engagement Strategy for Education
- Implement a Case Management Strategy for Education
- Plan Your Student Experience Community

Insights
- Report in Education Data Architecture (EDA)
Salesforce.org | Marketing Cloud

Getting Started
● Marketing Cloud for Nonprofits and Higher Education
● Marketing Cloud Data Management for Nonprofits and Higher Education

How To
● Set Up Social Studio for Nonprofits and Higher Education
Getting Started

- Work.com
Still Have Questions?

Ask questions, get answers, explore ideas, and be inspired by Salesforce experts and customers like you. Join the Trailblazer Community!

Join Now

More to explore

We support some Expert Coaching Sessions in additional languages. Explore the EMEA (French) or LATAM (Spanish, Portuguese) catalogs using the buttons below.

French
Spanish
Portuguese

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