

SUCCESS STORY

How Workfront Boosted Customer Experience and Streamlined Team Productivity with Zoomin for Salesforce

SUMMARY

Workfront set out to modernize and automate the way they deliver content. Spearheaded by Workfront's Technology and Technical Publications teams, the goal was to empower customers to independently learn about Workfront products, resolve technical issues, and better self-serve. They decided to make their Lightning-powered Salesforce Community the centerpiece of this strategy. They also understood that their rich user guidance authored in MadCap Flare would be most impactful for customer self-service and case deflection.

With Zoomin for Salesforce, Workfront was able to transform their community into a powerful self-service resource, providing intuitive navigation, precision findability, and secure localization across all of their product documentation. Zoomin helped Workfront optimize and automate their internal publishing workflows, thereby streamlining the delivery of content and reducing time-to-publish by 77%.

workfront

Headquarters: Lehi, Utah

Industry: Software | Project & Work Management Solutions

Employees: 1,000+

Revenue: \$200M

Workfront is the work management application platform for the enterprise, and partners with more than 3000 companies globally, including 50 percent of the Fortune 500.

Workfront gives enterprises the ability to see, measure, and analyze critical factors such as resources, outcomes, and priorities, keeping everyone on the same page, with a clear understanding of why their work matters.

Key Results



77%

reduction in time-to-publish



25 hours/week

reduction in publishing logistics time



Precision search
& findability



Intuitive navigation
& exploration

THE CHALLENGE

To further improve their ability to support and empower customers at every step of their journey, Workfront created a Lightning-powered Salesforce Community where users could access all the information they need in one place.

But they soon discovered that it was impossible to display the richness and hierarchical nature of their technical content – which was authored in MadCap Flare – in Salesforce. Without finding a way to inject their most authoritative, comprehensive and detailed rich content, they knew their community would be an incomplete resource.

Workfront first attempted to use MadCap Flare's native Salesforce connector. But this presented a number of challenges:



Tedious, manual updating process: Even the smallest of updates required Workfront to first archive the existing Salesforce Knowledge article, then manually overwrite it with the new content. This process took hours, was prone to manual error, and was out of step with Workfront's agile, efficient pace of development.



Confusing user experience: The migration of highly nested MadCap Flare content into Salesforce Knowledge articles meant the content needed to be effectively "flattened" into static and one-dimensional standalone articles, restricting navigation and making it hard for users to find their answers.



Poor findability: Relying upon Salesforce's native search, Workfront couldn't provide customers a unified search experience across all their diverse content, including native Salesforce objects and their Flare-authored product documentation. The manual archiving system meant search results were often duplicated, causing confusion and frustration.



Lack of localization: Limited localization functionality made it very difficult for Workfront to provide the personalized experience they wanted. With localized articles linking to either non-localized or unrelated content, users were often directed to irrelevant content.

Workfront sought a more sophisticated solution to ensure their Salesforce Community would provide the intuitive self-service experience their customers deserved, and the modern, secure and efficient workflows that leadership demanded.

THE SOLUTION

Using Zoomin for Salesforce, the Workfront team was able to unify access to all of their product documentation and user guidance. Zoomin's platform continuously ingests, synthesizes, and indexes all of Workfront's product documentation as it is published, and then injects it with full-fidelity and searchability into the Salesforce Community. This means Workfront customers can now easily find and intuitively navigate relevant product knowledge without leaving their Salesforce Community.

Workfront transformed their customer self-service experience by delivering their technical content directly into the Salesforce UI in an agile way with full fidelity - maintaining its structure, navigation elements, and branding. Updates and changes to the content made in MadCap Flare are now instantly published to the community, ensuring their documentation is always up to date.

Version control and multi-language support ensures users see the precise content that's relevant to them based on their Salesforce profile.



We felt like we were in really good hands with Zoomin. Their hands-on approach was outstanding.



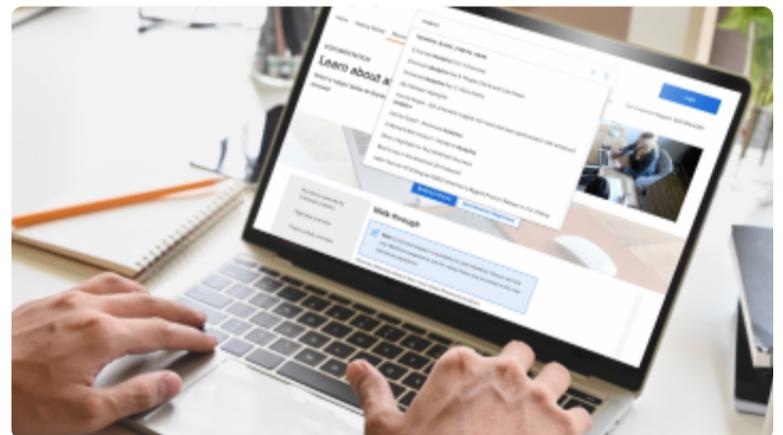
Brad Littler, Senior Technology Manager, Workfront

RESULTS

Zoomin's Salesforce components bring dynamically generated lists of topics into many pages in their community, because they are built to easily slide into existing Salesforce pages. This allows Workfront to blend their static community posts with dynamic Flare content, resulting in a superior user experience.

An intuitive, precision search experience means customers can easily navigate Workfront's content to find answers. Users are now proactively presented with the most relevant content for their needs, radically reducing the time it takes for them to find the answers they need to be productive.

Moving from a manual, error-prone publishing process to dynamic delivery has enabled the Workfront content team to become more agile, efficient and productive in their publishing process. Time-to-publish from Flare to Salesforce dropped by 77%, freeing up 20 to 25 hours per week. This dramatic improvement in internal productivity also boosted team morale, who can now focus on delivering the quality work they were hired to do rather than checking for errors.



Thanks to these improved processes, the team has been able to reduce the number of broken links in articles from 16% to zero. And they can now easily publish to a sandbox environment where they can review content updates and schedule automatic publishing to their online community.



Using Zoomin allowed us to switch to an enterprise way of writing rather than being stuck in the stone age.



Luke Penrod, Technical Writing Manager, Workfront