



Core Functions Co-Pilot Inline Guidance Delivers

1. Inline Training on Records

- Step-by-step guidance delivered directly in context (by object, field, user role, stage, etc).

2. Process Reinforcement via Nudges

- Triggered alerts when users meet or change a critical field.

3. Home Page Announcements

- Daily/weekly awareness reminders, motivational content, company updates, or spotlight content.

4. Searchable Knowledge Base

- Internal help system for processes, tips, documentation, policies, etc.

Additional High-Value Use Cases

1. Daily Culture Content

- Rotating quotes (motivation, leadership, humor).
- “Today in History” or “On This Day” events.
- Recognition shout-outs or employee spotlight of the week.

2. Micro Learning & Just-In-Time Training

- Short tips of the day: "1-Minute Tip: What's the difference between Task and Event?"



- Embedded video tutorials inside KB (YouTube/Vimeo links or embedded .mp4).
- Weekly skill focus: e.g. “Advanced Reports Week – Tip #3: Cross Filters”

3. Compliance Reminders & Risk Reduction

- Timely policy nudges: “Reminder: All deals over \$50k must be routed through Legal.”
- Security awareness: “New phishing campaign going around – don’t click unknown links.”
- Dynamic onboarding: Show only to new hires or based on profile.

4. Change Management Alerts

- Feature releases: “Forecasting tab updated. Click here for what’s new.”
- Org-wide process changes: “Stage 2 no longer includes Quote Step.”
- System alerts: “Salesforce downtime planned Friday 7pm PST.”

5. Recognition & Engagement

- Display top performers on the homepage.
- Trigger nudges when a rep hits a goal (e.g., “🎉 You closed your 10th deal this month!”).
- New hire intros or birthday/anniversary alerts.

6. Survey Integration

- Trigger quick pulse surveys: “How confident are you in the new QBR format?”



- Feedback capture: “Was this Co-Pilot guidance helpful?” thumbs up/down.
- Training needs intake: “What topics would you like support on this quarter?”

app Savvy group