



# Effective Trial Management for ISV Partners on Salesforce AppExchange

**Praveen Kotholliparambil Haridasan, Hemant Jawale**

*Email: praveenkhari@gmail.com, heman.t.jawale@gmail.com*

## Abstract

Providing a trial version of your product is not only a desirable feature in the very competitive realm of cloud-based solutions. It has become an essential task for a very effective go-to-market strategy. The present article discusses the importance of providing trials and their advantages, together with the many trial options available to Independent Software Vendors (ISV) partners on Salesforce AppExchange. For efficient promotion of adoption and development of a go-to-market strategy, ISV partners can leverage their expertise in these aspects to enhance the efficiency of trials

## Introduction

Salesforce 1 Platform has been selected by numerous Independent Software Vendors (ISVs) for the development and distribution of their solutions. Certain solutions enhance the customer's CRM capabilities or provide a fully autonomous software solution. Designing and developing a high-quality application is not enough to establish a strong presence in competitive cloud-based app marketplaces like AppExchange. To gain prospects' attention, providing a customer trial and other marketing activities are crucial. This article discusses why providing a trial is important for ISV partners to drive revenue and what options are available for ISVs on Salesforce AppExchange.

### The Importance of Offering Trials

Before we explain the benefits of offering a trial, let's understand what it means to provide a trial in software solutions, especially SaaS applications. A trial is a period during which potential customers can use the software for free or at a reduced cost to evaluate its features and benefits before committing to a subscription or purchase. The goal of offering

a trial is to help customers feel more comfortable by letting them try out the products features and suitability for their requirements before making a financial investment upfront. Trials are frequently utilized as a marketing and sales strategy to boost conversions by enabling users to experience the products benefits.

Providing trials plays a crucial role in getting customers involved in the sales journey by letting them test products before making a purchase decision without having to be concerned about the financial aspect of it all. For partners using Salesforce AppExchange services have a time offering free trials due, to the convenient trial features integrated within Salesforce platform itself which simplifies the setup process without the hassle of dealing with complicated licenses and technical configurations. The License Management App (LMA) assists in handling trial licenses and automatically transforms potential customers into leads seamlessly which helps streamline the entire sales process. Free trials offer advantages not to customers but also help sales teams in developing personalized demonstrations and

offering prearranged environments for internal teams such as training and documentation purposes. To maximize the benefits of trials tailored experiences should be designed by ISVs that cater to the unique requirements of their target audience through mockups and sample data presentations.

### Trial Options for AppExchange Partners

Salesforce offers multiple methods for ISVs to provide trials to potential customers. Each method has its own set of advantages, and the choice depends on the ISV's product and business strategy. We will do a deep dive into each trial option and try to answer three questions.

- What is the customer experience with the specific trial option?
- What are the benefits of that specific trial option?
- How do we implement that specific trial option?

### Test Drive

A Test Drive on Salesforce AppExchange is a feature that allows potential customers to explore an application in a pre-configured environment without the need for installation or setup. Much like an automotive test drive, where a potential buyer gets behind the wheel of a car to experience how it feels and performs, an AppExchange Test Drive lets users "take the app for a spin" to understand its features and functionality before committing to a purchase. However, unlike a car test drive, where the driver controls the vehicle in a real-world scenario, AppExchange Test Drives offer a guided, controlled experience. The app is already configured with sample data, and users are often walked through key features, making it easy to explore the solution without requiring technical expertise. This comparison highlights the core advantage of Test Drives: a hassle-free, ready-to-experience demo that showcases the app's strengths, enabling potential buyers to evaluate its fit for their business needs quickly.

### Customer Experience

The customer experience starts on the AppExchange listing page. Application listings that have enabled Test Drive will have an additional button "Test Drive". Once the customer clicks on the button, the user is taken to a pre-configured org's landing page. Then, the user can explore the application as a read-only user.



### Test Drive Setup

The Test Drive setup starts with creating the test drive org. The ISV partner should create their Test Drive org through the EnvironmentHub app from their PBO and use the Salesforce template ID "0TT5Y000004aUeY." The trial org created with this template ID will give the ISV partner a new org. This org will have two users. One as an admin and another as a test drive read-only user.

Once the ISV partner installs their application and sets up data, the ISV partner can link the Test Drive org with the application listing. This will enable the Test Drive button on the AppExchange listing, and the customer will be able to start exploring the Test Drive org.

### Test Drive Benefits & Use Cases

Not every trial option is ideal for all types of application use cases. Test Drive is perfect for simpler solutions or when an ISV wants to highlight a specific feature. This will also be best for ISVs that target customers who prefer a quick overview rather than an in-depth exploration.

Whenever a customer clicks on the Test Drive button, it creates a lead in the ISV partner's PBO org. So the ISV partner's sales team can follow up on sales and provide additional support to the customer. We use only one org for the Test Drive, so any changes, such as data or new package installation, are instantly available to customers who are exploring your application through the Test Drive.

Test Drive is a low commitment for ISV partners. There is no contract or guarantee that the application will provide all the features that the customer is looking for. Test Drive is pre-configured for all types of customers. Test Drive provides only a read-only experience to your customers. This is by design. We don't want any customer to modify your data and make it toxic or unusable by other users. All customers share the same test drive org.

### **Trialforce**

Trialforce is a powerful tool that allows ISVs to create customized trial experiences for their potential customers. With Trialforce, ISVs can provision a fully functional Salesforce org that is pre-configured with their application, allowing customers to explore the app in a controlled environment.

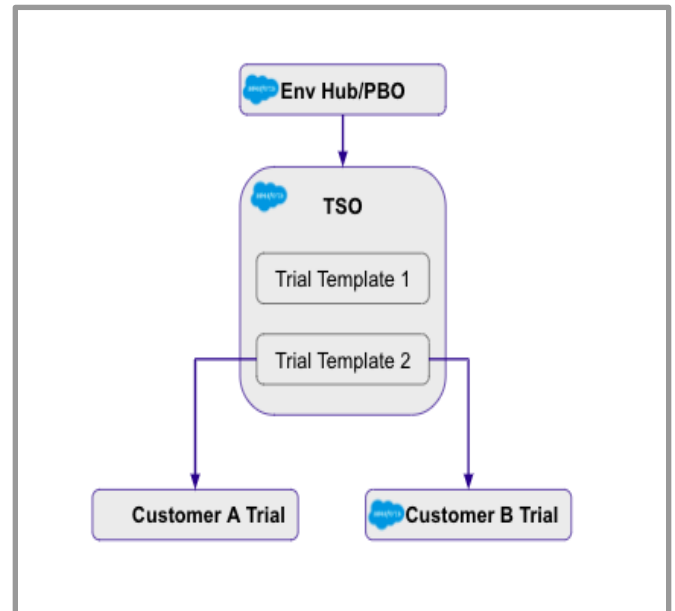
### **Customer Experience**

The customer will get a new Salesforce org from the partner with a fully configured application and the sample data the ISV partner prepared as part of the trial setup. The customer admin can onboard additional users to the org and enable multiple users to take up the trial from the same customer's company.

### **Trialforce Setup**

Trialforce setup starts with creating the Trial Source Org (TSO). ISV partners can create a TSO org from their EnvironmentHub. Once the ISV partner gets access to the TSO org, the partner should install the application and set up the data they intend to ship along with the trial org. Most ISV partners ship some basic data, so the customer can start the trial immediately.

Once the application configuration and data setup are done, the partner can create a trial template ID from the TSO setup. There can be multiple trial template IDs can be created and the partner can select to include or exclude the data from the template. These templates are like a snap shot of the configuration and the data. So whenever we make changes to the configuration or install a new version of the application. The ISV partner should create a new version of the template.



### **Trialforce Benefits & Use Case**

Once again, not every trial option fits all types of applications. So, it is important to understand the use cases for Trialforce and when it adds the most value to customers. Trialforce is suitable for complex applications or applications that require hands-on experience to demonstrate their value. It is also a good fit for ISVs who want to provide a personalized trial experience that reflects the customer's specific needs.

When we talk about the benefits of Trialforce, we start with its customizable attribute. Trialforce is highly customizable since it creates a dedicated org for the customer. So, the customer admin or the ISV partner can change that org after the trial spinup. Trialforce can provide complete functionalities as a trial, and the customer can read and write data to the trial org. The ISVs can prepopulate the trial with sample data, which helps users better understand the application's capabilities.

### **Installable Trial**

The last trial option that Salesforce provides to AppExchange partners is Installable Trials. As the name says, in this scenario, the ISVs can offer free trials directly to the customer's exciting Salesforce org.

### **Customer Experience**

The Customer Experience for the Installable Trial may be one of the best across all the trial options. In an Installable trial, the customer uses their existing Sandbox org or sometimes production to explore the ISV solution. We recommend providing the trial in sandboxes rather than in customer production orgs. The customer will be familiar with the data and other processes.

### **Installable Trial Setup**

The ISV partner will install their solution in the customer sandbox org and complete the remaining configuration. The customer admin provides the proper access rights to the trial users. The ISV can control the number of trial users and trial period from their Licence Management Application in Partner Business Org.

### **Installable Trial Benefits & Use Case**

The key benefit of an Installable Trial is that the customer is that the trial is on customer data. So the customer can use the app the way they will after the sales cycle. They get to complete the trial, and the ISV can extend it if needed. This trial option is fit for solutions that need more extended trial periods and where the customer demands to have the trial with their data and incorporate their other business processes.

### **Best Practices for Managing Trials**

To maximize the benefits of offering trials, ISVs should follow these best practices:

#### **Define Clear Objectives**

Before launching a trial, define what you hope to achieve. Whether it's increasing conversion rates, gathering user feedback, or expanding market reach, having clear objectives will help guide the trial design and evaluation.

#### **Optimize the Onboarding Process**

Ensure that the trial experience is seamless by providing clear instructions, tutorials, or guided tours. This helps users get the most out of the trial and reduces the likelihood of them abandoning it prematurely.

#### **Monitor and Analyze Trial Data**

Use analytics to track how customers interact with your trial. Understanding which features are most used, where users drop off, and how long they spend in the trial environment can provide insights that drive improvements in both the product and the trial process.

### **Follow Up with Trial Users**

Don't let the trial period end without follow-up. Whether through automated emails, personal outreach from sales teams, or in-app messaging, engaging with trial users can increase conversion rates and provide opportunities to address any concerns.

### **Keep Trials Up to Date**

Ensure that your trial environment reflects the latest version of your product. Outdated trials can lead to confusion and dissatisfaction, reducing the likelihood of conversion.

## **Conclusion**

In conclusion, providing a trial for your Salesforce AppExchange solution is a critical strategy for ISV partners. It allows potential customers to experience the value of your product firsthand, builds trust, and ultimately drives higher conversion rates. By leveraging the different trial options available—Trialforce, Test Drives, and free trials on your website—ISVs can tailor their approach to meet the needs of their target audience. Following best practices in trial management ensures that the trial experience is positive, informative, and conducive to conversion.

## **Reference**

- [1] [Manage Orgs with Environment Hub](#)
- [2] [Create a Test Drive Org with Environment Hub](#)
- [3] [How AppExchange Test Drive Works](#)
- [4] [Create a Trialforce Template](#)
- [5] [Provide Free Trials on Your AppExchange Listing Using a Trialforce Template](#)