

⚡ Making a Successful Transition to Lightning Experience

10 SIMPLE STEPS TO ROLL OUT LIGHTNING FOR YOUR COMPANY

1 RUN THE READINESS CHECK

Run the [Readiness Check](#) and see which profile(s) is the most ready for Lightning Experience.

2 PICK A CHAMPION

Within that profile, pick a Salesforce champion. (If you don't have one, pick the person who uses Salesforce the most and has recommendations to make it better.)

3 CREATE A PERMISSION SET

Create a permission set with the Lightning Experience User permission and assign it to the champion so they can access the new interface.

4 TRAIN THE CHAMPION

Work with the champion to make sure they are comfortable using Lightning Experience. Sit next to them as they start working in it and help them with any questions, or identify any potential issues. Address any questions they have quickly.

5 ASK THE CHAMPION

Ask the champion to do their job in Lightning Experience for a week. (Assure them there's no risk as they can always switch back to Salesforce Classic).

6 SCHEDULE DEBRIEF

After a week, schedule a debrief session to get feedback.

7 FIX ISSUES REPORTED

Fix the top priority issues identified by the champion.

8 ENABLE FEATURES

Enable one of the game-changing [Lightning Experience-only features](#)

9 GIVE ACCESS

Give everyone else with the same profile access to the Lightning Experience.

10 RINSE AND REPEAT

Rinse and repeat with other profiles, working your way up to the most complex cases.

When moving to Lightning Experience, it doesn't have to be an all-or-nothing process. You control who gets it and when they get it. As a matter of fact, our recommendation is to plan your rollout with a phased approach accelerating your wins as you respond to feedback from a pilot group of internal Salesforce champions.



3 EASY TIPS TO CEMENT USER ADOPTION

Keep in mind, the steps above get you 20% of the way there. The other 80% of the transition—and what's essential to cementing user adoption—is a good change management strategy. For a successful transition, do these simple things:



COMMUNICATE

Communicate why you're moving to Lightning Experience. Help your teams understand the productivity gains they'll get with the many cool features available only in Lightning Experience.



CREATE CHEAT SHEETS

Create simple cheat sheets as training materials. A cheat sheet can be a series of screenshots and some explanation on how to do something standard in Classic that is a little different in Lightning. A good example is creating and using the Kanban board.



SHOW CREDIBILITY

For better credibility, have your champion(s) deliver your Lightning Experience training instead of your training or enablement team. The champion is already on board with Lightning Experience and can help everyone else see the value of making the change.



ADDITIONAL HELPFUL RESOURCES:

[Lightning Roadmap](#)

[Circle of Success](#)

[Trailblazer Community](#)

Access all links on digital version of this 2 pager here: http://bit.ly/LEXRollOut_2

PREMIER ACCELERATORS TO CONSIDER:

[Readiness Assessment](#)

[Configuration Fast Start](#)

[Sales Cloud Lightning Fast Start](#)

[Service Cloud Lightning Fast Start](#)



ONE FINAL NOTE

Your champions will make sure Lightning Experience is configured optimally for each of their teams, be your ears on the floor, and help answer questions that arise as they happen. And best of all, the champion model scales indefinitely without requiring extra resources.

