10 SIMPLE STEPS + 3 EASY TIPS FOR

Successfully Rolling Out Lightning Experience

salesforce

10 SIMPLE STEPS TO MOVE YOUR USERS

1 RUN THE READINESS CHECK
Check the Readiness Report to see which profile is most ready for Lightning Experience.

2 PICK A CHAMPION
For that profile, elect someone who uses Salesforce the most and has recommendations to make the experience better.

3 GIVE ACCESS TO THE CHAMPION
Create a permission set with the Lightning Experience User permission and assign it to the champion. Then turn on Lightning Experience.

4 TRAIN THE CHAMPION
Prepare the champion to work in Lightning Experience. Sit next to them as they get started and help with any questions. Resolve issues quickly to make good use of the champion's time.

5 GIVE IT A WEEK
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 GET FEEDBACK
Get the champion's input on what's good and what needs attention.

7 FIX PRIORITY ISSUES
Focus on business-stopping issues from your champion and Readiness Report.

8 BOOST PRODUCTIVITY
Enable a Lightning Experience-only feature that's game-changing for the profile. Do more if you have time.

9 GO LIVE!
Grant everyone else with the same profile access to Lightning Experience.

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

*Moving users to Lightning Experience **does not have to be an all-or-nothing process.** We recommend rolling out in phases, leveraging feedback from Salesforce champions as you go.*

Get started with the Lightning Experience Transition Assistant! It's your one-stop shop for all recommended transition activities, tools, and resources.

+25% INCREASE IN PRODUCTIVITY

+50% FASTER TIME TO MARKET

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. Use the Change Management Hub for tools and help. Start with these simple tips:

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 training materials with screenshots and details that show how common Salesforce activities are a little different in Lightning Experience. A good example is 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.

THE JOURNEY TO LIGHTNING EXPERIENCE

Here's your itinerary for completing a successful transition.

Journey to Lightning Experience Video Series

Lightning Transition Learning Map

Join the Lightning Now Trailblazer Community

CHECK OUT THESE AWESOME ACCELERATORS:

Lightning Platform: Readiness Assessment

Sales Cloud: Improve Efficiencies With Key Lightning Features

Getting Started with Service Cloud Lightning

Getting Started with Platform Configuration 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.

Learn more about how easy it is to roll out Lightning Experience in our free downloadable guide!

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