SALESFORCE LIGHTNING MIGRATION

A comprehensive guide on transitioning from Classic to Salesforce Lightning
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Summary / Takeaway
About our Lightning Accelerator
About Pexlify
INTRODUCTION

Thank you for downloading our Salesforce Lightning Migration eBook.

This eBook has been designed to provide all the necessary information to help make informed decisions when deciding to migrate to Salesforce Lightning.

Salesforce is the fastest growing CRM system in the world. Even with 10.48 billion USD in revenue this year and a net value of 97 billion USD [Forbes 2018], Salesforce has continued to investment heavily in technology and innovation.

Over the last year, interest surrounding migrating from Salesforce Classic to Lightning has increased significantly. From the UI to feature-rich components, Salesforce Lightning is the perfect tool to help companies transform and automate their business processes.

From a technical and development standpoint, Lightning’s ease-of-use and drag-and-drop functionality makes it easier to design page layouts and develop unique apps.

So if you or your company are thinking of migrating to Lightning, keep reading to learn more.
In 2013, Salesforce realised they needed to transform their offering in order to stay at the top of their game.

With over half the planet using mobile phones, they decided to put a huge amount of emphasis and focus on mobile development. As a result, the Salesforce1 mobile app was born. Salesforce1 is an accessible app that allows users to interact with their data and customers on their mobile devices.

Fast forward to 2015, Salesforce noticed there was a large contrast between the desktop browser experience and the Salesforce1 app. By developing a new User Interface (UI), they could unify the user experience and simplify tasks, no matter what device was being used.

What did they call this new UI? **Lightning Experience**.

Salesforce officially launched Lightning Experience at Dreamforce 2015, and is now the sole option for new customers.

The main purpose of Lightning? Improve productivity by using a simplified UI that is made for multi-tasking and optimised for speed. Using fewer clicks and automation, users are able to achieve more in the same amount of time and reduce inefficiencies.

Want to know more about what Salesforce Lightning is? Read our blog post: ‘What is Salesforce Lightning?’
CHAPTER 2: THE COMPONENTS THAT MAKE UP LIGHTNING

People may think Lightning is just a shiny, new UI. Well, they’re wrong – it’s so much more.

Lightning is a collection of tools and technologies behind the significant upgrade to the Salesforce platform. Let’s take a look at some these components and frameworks in more detail.
Experience

There are two parts to the Lightning Experience. The New UI and the Salesforce app.

- The User Experience

Experience is the component most users will interact with.

This new UI is the face of the platform - the look, feel and user experience.

Optimised for speed and improvements in automation and workflow processes, Lightning is the ultimate productivity increasing, time-saving, smart CRM solution.

Bonus: the mobile app is included FREE with every employee licence.

- The Salesforce App

The Salesforce1 app is where it all started. Not only the start of a whole new UI but the beginning of an entire new way of managing workflows and processes. The modern look and smart usage inspired Salesforce to want the same usability, functionality and experience across all devices.

Users can integrate the Salesforce app seamlessly with thousands of mobile apps from the AppExchange. With just a few clicks and drag and drop functionality, build custom apps to match your requirements and customers.
**Lightning Component Framework**

The Javascript framework is what makes Salesforce so customisable and optimized for performance. Ranging from a single line of text to an entire app, the components are self-contained reusable units (i.e. reusable pieces of code).

The Framework was made with the intentions of using any device to develop dynamic web apps (mobile, tablet, desktop) and is built on an open source Aura framework. This allows the ability to build apps that are independent of your Salesforce data.

**Visual Building Tools**

This functionality heavily relies on HTML 5 drag and drop API. You can use the Lightning App Builder to customize the Lightning Experience and Salesforce1 Mobile app, as well as Community Builder to customize template-based communities.

**Lightning Exchange**

The AppExchange is the marketplace for business specific Salesforce apps. With millions of installs and thousands of customer reviews, this proven ecosystem will help you get the most out of Salesforce.

The Lightning Exchange section you can find consulting partners, developers, and 70+ partner components, that will help you run your business and enhance the capacity of your Salesforce Org.
Lightning Design System

LDS provides style guides and modern enterprise UX best practices to help build custom applications and rich enterprise experiences. It facilitates developers and designers using ready-to-go interface elements and components in Sketch Templates, or HTML and CSS code.

Constantly monitored, maintained and tested by the UX team, LDS is always well served with updates. The CSS framework can be used to any capacity, including with Heroku, Lightning or Visualforce.

Want to learn more about the components in more detail? Check out this webinar on the Salesforce.

Key Benefits of Lightning

From minor updates and bug-fixes, to major new features that cut task time nearly in half, Lightning is full of ways to help your business succeed. In order to better understand this, we have listed some of the key benefits below:

• Modern UI - Results in better activity time using interactive/multi tabs, flexible dashboards and reports and more.
• Unified Salesforce Experience - Responsive platform across different types of devices (computer, tablet or mobile).
• Mobile Connectivity - Using the Salesforce1 app, update customer information and actions from any device.
• Lightning Ready Apps & Components - Install pre-made 3rd party apps in your Org.
• Visualise Your Data - Create interactive dashboards and reports.
• Pexlify Accelerators – Pexlify have our own unique accelerators around multiple aspects of Salesforce, including Lightning Migration.
CHAPTER 3: HOW LIGHTNING HELPS YOUR BUSINESS THROUGH ENHANCED PRODUCTIVITY.

Whether it’s your sales team, support team or field employees, Lightning is here to help.

**Productivity** - you might have heard people mention over and over - this is what Lightning Experience was designed for. Well, it’s true - from data entry automation to streamlined workflows, Salesforce delivers efficiencies across all departments.

Creating a smarter way of working delivers an overall better experience for employees. Happier employees work better and more effectively.
Salesforce Lightning delivers enhanced productivity.

- +29% Faster Reporting
- +40% Improved Collaboration
- +50% Faster Time to Market
- +25% Time Saved Developing
- +21% Improved Win-Rates
- +25% Increased Productivity
- +28% Less Time Standardising
1 - Enhancements in Chatter

In today's organisations, improving communication and collaboration between teams and departments is essential.

In Chatter, users can tag other colleagues, hyperlink to a specific record and save drafts. This allows users to connect and interact with each other, easily draw attention to records and save users time when busy.

2 - Utility Bar, Global Actions and Macros

The ability to create a new record from any location in Salesforce is more beneficial then one might think. Global actions gives users the following opportunities:

- Add tasks and activities quickly while working - No more distractions or interruptions.
- Layouts to use features specific to them anywhere in Salesforce.
- Add quick notes, files, contacts, etc. quickly with the utility bar.
- Set up additional features in their layout, like a ‘Send email’ action.

‘Macros’ can be set up to do a series of tasks, like logging a call with details, emailing an update to your team, starting an email using a template and setting a task to follow up in 2 days, etc.

Setting up action macros can greatly reduce the time spent manually inputting data.
In the navigation section, a time saver and productivity enhancer for many are Keyboard shortcuts. There is actually a shortcut to shortcuts.

You can view the shortcut menu by clicking: Ctrl+/ on Windows and Cmd+/ on macOS. Here is what the Keyboard shortcuts look like.

### 3 - Personalised Navigation and Favourites

![Keyboard Shortcuts](image)

<table>
<thead>
<tr>
<th>Global</th>
<th>Navigation</th>
<th>Tabs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close or deselect</td>
<td>Esc</td>
<td>Focus notifications</td>
</tr>
<tr>
<td>Copy URL for active tab</td>
<td>Ctrl+c, then s</td>
<td>Focus notifications (reverse order)</td>
</tr>
<tr>
<td>Copy URL for active workspace tab and subtabs</td>
<td>Ctrl+c, then w</td>
<td>Go to docked composer</td>
</tr>
<tr>
<td>Edit</td>
<td>Ctrl+e</td>
<td>Go to item menu</td>
</tr>
<tr>
<td>Insert quick text</td>
<td>Ctrl+.]</td>
<td>Go to list search</td>
</tr>
<tr>
<td>Open or close History</td>
<td>Ctrl+h</td>
<td>Go to list view</td>
</tr>
<tr>
<td>Open or close Macros</td>
<td>Ctrl+m</td>
<td>Go to publisher</td>
</tr>
<tr>
<td>Open or close Notes</td>
<td>Ctrl+n</td>
<td>Go to subtab</td>
</tr>
<tr>
<td>Open or close Omni-Channel</td>
<td>Ctrl+o</td>
<td>Go to utility bar</td>
</tr>
<tr>
<td>Post to feed</td>
<td>Ctrl+Enter</td>
<td>Go to workspace tab</td>
</tr>
<tr>
<td>Save</td>
<td>Ctrl+s</td>
<td>Switch tabs</td>
</tr>
<tr>
<td>Search</td>
<td>Ctrl+ /</td>
<td>Switch walkthrough</td>
</tr>
<tr>
<td>Show this menu</td>
<td>Ctrl+ /</td>
<td>focus</td>
</tr>
</tbody>
</table>

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*Shift | Command

Learn More

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[Image of a company logo: Pexlify Enterprise Solutions]
With the Lightning Console app, users can work and edit multiple records at one time with the benefits of ‘Subfolders’ and ‘Subtabs’. Save time and avoid using multiple tabs in the browser - work more productively and safely.

Everyone with a Salesforce licence has access to console apps. With Winter’19 update, save any stage or report to the dashboard and filter down more. For more information on the Console app and how to set up, you can read more [here](#).
5 - Search Enhancement and Path

Search - With the new improved search options, explore and examine data in a smarter way. To begin searching, simply start by typing a name, account, records, object, etc. to find what you are looking for.

Path - Path allows Admins to define what data is being brought to their users, steps they need to take to move a process forward, as well as create a set of rules/guidelines for successful completion. The Path is rendered as a horizontal bar (see above) with one chevron for each picklist item. Path not only works great for sales processes, but also works great with Cases, Quotes, Contracts, Orders, Accounts, Person Accounts, Campaigns, and Custom Objects.

What all users should be taking advantage of:

Download the FREE mobile app

The mobile app is included with every user licence without any additional charge. A lot of users are not even aware of how much they would enjoy using the mobile app. Sales reps and others on the road can benefit from using the app while on the go. Easily update opportunities and activities on your device, while managers can also check on their reps at any time, anywhere.
The Story of Kanban

Perhaps to your surprise, Kanban originates from a process used in grocery shops in Japan over 50 years ago. Toyota could see that Kanban showed significant efficiencies when used for inventory management and adapted it for their factory floors.

They soon realised it provided a perfect set-up for teams that wanted continuous turnover, as they could align their massive inventory levels with the actual consumption of materials and deliver products on time.

Teams, in any sector or department, can experience shortened cycle times, fewer bottlenecks, and avail of Visual Metrics with Kanban. It is particularly useful for sales teams, allowing them to work smarter and see their leads and opportunities in a more effective way. When sales reps use Kanban view, they can easily see what opportunities are at the most important stages and utilise their time effectively.

You can also use drag and drop features to move potential customers from different stages of the sales process. Kanban can be adapted to include any stages in a sales process which can be unique to a business.
Kanban View
Enhanced User Experience

Migrating to Lightning provides amazing opportunities for companies to improve and streamline business processes.

Would you like to give your employees the opportunity to enjoy their work more? Give them ability to multi-task and automate processes? Give them the tools they need to be more productive and save time?

With up to 25 tabs, 3-column layouts, Paths, Components and more, your employees will not only enjoy the experience but improve their performance as well.

Plus, with the new UI and features, your employees won’t feel left behind when Lightning is being updated and Classic is not. They will work more efficiently and be a lot happier.
Prolonging Only Increases Difficulty Of Inevitable Transition

As with anything to do with change, the longer you leave it, the harder the transition will be.

There has never been more reason to switch to lightning than there is now. With no more future updates for Classic, it will continue to fall further and further behind Lightning, until Salesforce eventually deactivates it all together.

Although Salesforce has not officially said Classic as a whole, is being disabled, it's important to remember nothing lasts forever. If your IT team is still developing in Classic, this may be unintentionally causing you more harm in the long term.

As a result, new pages and components may also need to be migrated or completely recreated to use in Lightning, thus leaving you with a lot of technical debt.
Mobile Connectivity and Cross-Platform Uniformity

One unified User Interface and Experience across all platforms and devices – that’s the goal of Lightning.

If your employees use the Salesforce1 app but still using classic on their desktop, they are constantly seeing different UI’s. This makes employees prone to errors and mistakes, as well as causing regular confusion.

Why not give them a consolidated view and set of tools across all devices?

By making their lives easier, you’ll not only improve the overall functionality of the system, as users can input, edit and manage data with the same look and feel across all devices, but you will also improve their overall productivity.
CHAPTER 4: MIGRATION - SHOULD YOU MAKE THE SWITCH?

If you are thinking about making the switch to Lightning, then you certainly should. Below are some facts that highlight the financial benefits of migrating.

In addition to increasing productivity and boosting sales, Lightning Experience can reduce costs and save you money and time. In a recent report by Forrester, companies received a 341% ROI in 3 years by migrating to Lightning. This intensive report studied 7 companies, and the results after 14 months confirmed the system had completely paid for itself.

Some of the key findings from the report are:

• 50% faster time to market on application development
• Average of $1,594,426 sales efficiency savings
• $366,000 savings in time savings for business sponsors and power users
• $1,242,487 savings on development
• $169,106 in savings on application developer turnover rates
• Total $3,371,834 over three years

You can read the full report here.

- No longer possible to integrate Outlook with Classic.
- No more support for email Studio in Classic come January 2019.
Important Features In Lightning To Help Your Company

1. **Lightning Ready Apps - AppExchange** - There are tons of pre-made 3rd party apps for all your business needs. Pexlify currently offers 2 apps on the AppExchange, Forcecast (SPM Tool) and QA Scorecard (evaluate and score agents). 3rd party apps can help your company improve in every department from sales to marketing and everything in between.

2. **Lightning App Builder** - With drag and drop Lightning Components, you don't have to be a developer or coder to build mobile and desktop apps. There are three types of components in Lightning Builder: Pre-built components from Salesforce, components from Lightning Exchange built by partners, and custom components.

3. **Field Service Lightning** - One solution that is particularly impressive and now available on the lightning platform is 'Field Service Lightning'. This a perfect solution for companies who have employees working on-site with customers. Keep track of stock and vehicles so employees can be prepared and productive when talking with clients. Employees can also scan products and barcodes with their phones. Field Service Lightning allows your employees to easily capture customers signatures and return reports quickly and efficiently with only a few clicks.

4. **New Lightning Report Builder** - Only available in Lightning, the new report builder is superior to the Classic report builder in many ways. It's smarter and has more intuitive functionality - group, filter, and summarize records to answer business questions such as “How much revenue did we generate in the South East last quarter?”, “Which lead source is generating the most closed opportunities?” or “What is the average age of all open cases?"
While Lightning has a new and improved UI, there are still a few features that did not make the cut. Some of these features include Custom JavaScript Buttons, Recycle Bin, the Sidebar, some apps from the AppExchange and the ability to run Salesforce on IE11 (Internet Explorer 11). For everything left behind, there’s either a better alternative or simply no longer a need for the feature within the new setup.

Some other features excluded are: Similar Opportunities, Big Deal Alerts, Opportunity split details in the opportunities list, SOS, Solutions, Customizable Forecasting, Partner Portals, Work.com. For more details, you can see each feature and which version it is available here.

There are undoubtedly a lot of differences between Salesforce’s Lightning and Classic. The main differences being the UI, framework and design system.

We have created an infographic – on the left - listing the main differences between Classic and Lightning, section by section.
CHAPTER 6. TECHNICAL CHALLENGES (VF Pages)

Before Lightning, the prevailing design was to use Visualforce to render the output from JavaScript frameworks such as Backbone, Angular, Ember, Sencha, and others. However, this approach was a barrier to a truly unified experience.

As Mike Topalovich states “Lightning Experience and Lightning Component Framework solves a problem...Providing a single, integrated framework for developers that enabled the creation of rich, responsive applications that could be seamlessly “plugged in” virtually anywhere in the UI rather than having to stand alone in a separate container.

So, what are the biggest technical challenges when migrating to lightning?

- Identifying functionality supported in classic but not in Lightning.
- Reviewing functionality of Javascript buttons or Visualforce pages that do not work in Lightning.
- Making sure users are comfortable with the new UI and functionality.
Tips For Dealing With VF Pages

1. **Keep It Simple, Stupid (KISS)** – To start, in our opinion, most Visualforce (VF) pages are not easy to breakdown into an individual component. With this in mind, when starting to migrate, it keep simple by selecting VF pages that are easy to convert and do not accept user input or require complex processing.

2. **Use Lightning Components to break up VF pages** - Lightning Components for Visualforce allows you to add Lightning components to your VF pages to combine features you’ve built using both solutions. Using this option, you can break up your VF page into smaller components, continue hosting it in Classic and then migrate the entire page to Lightning, once all components are developed.

3. **Salesforce Lightning Design System** – Another option is to use SLDS styling to convert your VF pages to have a similar look and feel to Lightning. SLDS uses a CSS framework that gives access to the icons, color palettes, and fonts. To use SLDS, it only takes tweaks in your code and a few things to remember. For the most part, Visualforce code that uses SLDS “just works”.

4. **Base Lightning Components** - Base Lightning Components help to streamline Lightning development. It provides the building blocks for form-based components, structural components like tabs and cards, as well as layout components based on the responsive grid system of SLDS. See the full list of Base components [here](#).
In our final chapter, we will share the methodology of migrating to the promised land in 8 steps.

1. **Outline Goals**

   - Make sure lightning is the right option for your business at this time. You don’t want to begin the implementation process and suddenly realize your company is not ready for it yet.

   - Outline your goals - make a list of what you want to get out of lightning and how it will improve your company - increase productivity? better sales process? reduce costs? all of the above?
2. Plan / Map

Once you know your goals, you can start creating a plan of action. Take your time and create documents like the following - trust us, it can save a lot of pain in the future:

Checklist:
• Create a checklist to help complete stages before moving onto the next one. This will help avoid errors or mistakes later. Here is a great checklist to base off from Salesforce themselves!

Management change plan:
• To avoid unnecessary stress and loss of work hours, you will need a change plan to put to action during the rollout. Below, Salesforce has created a framework for change in your organization which consists of Communications & Training. You can then delve into and break down the stages, step-by-step, taking each of your goals into account.

Here's an example from Salesforce:

<table>
<thead>
<tr>
<th>What (The Content of the Communication)</th>
<th>Why (Communication Purpose, then description. See purpose codes below)</th>
<th>Who (Responsible, in [italic], then Audience)</th>
<th>Audience</th>
<th>When (T-Minus Schedule)</th>
<th>How (Typical Methods of Communication)</th>
<th>Follow-up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lightning is Coming</td>
<td>Prepare the Audience for the Launch</td>
<td>Executive</td>
<td>Training Lead</td>
<td>T-40</td>
<td>Webinar</td>
<td>In-Person</td>
</tr>
<tr>
<td>Lightning is Coming</td>
<td>Prepare the Audience for the Launch</td>
<td>Regional Leader</td>
<td>Change Management Lead</td>
<td>T-40</td>
<td>Webinar</td>
<td>In-Person</td>
</tr>
<tr>
<td>Lightning is Coming</td>
<td>Prepare the Audience for the Launch</td>
<td>Sales Manager</td>
<td>Executive</td>
<td>T-30</td>
<td>In-Person</td>
<td>Virtual</td>
</tr>
<tr>
<td>Lightning is Coming</td>
<td>Prepare the Audience for the Launch</td>
<td>Change Management Lead</td>
<td>Training Lead</td>
<td>T-30</td>
<td>Virtual</td>
<td>Email</td>
</tr>
<tr>
<td>Lightning is Coming</td>
<td>Prepare the Audience for the Launch</td>
<td>Super-User</td>
<td>Executive</td>
<td>T-20</td>
<td>Email</td>
<td>Meetings</td>
</tr>
<tr>
<td>Lightning is Coming</td>
<td>Prepare the Audience for the Launch</td>
<td>Executive</td>
<td>Training Lead</td>
<td>T-40</td>
<td>All Hands Meeting</td>
<td>Chatter</td>
</tr>
</tbody>
</table>
3. Prepare yourself and your employees

Before migrating to Lightning, there are a lot of steps and actions your company can take to prepare. One essential tool is - Trailhead.

Trailhead is a great way to learn and prepare your employees for the user experience change. Make them a pro at lightning before they even use it!

Two great Trailmixes to help your employees

- Make the Move to Lightning Experience
- Roll Out Lightning

Select a group of users to test it on first

Identify a group of power users who can test out Lightning first before rolling out to the rest of the company. This will help identify any usability issues, problems with page layouts. You can then make corrections and improve the configurations for your employees.

Readiness test

Salesforce provides you the opportunity to see how ready your Org is for lightning.

To request a readiness test: Select setup at the top of your page -> select 'Lightning Experience' (tabs on the left) -> ‘Check Readiness’ (top tab). Here you can request the readiness test (example image below).

Within a few minutes, the document will then appear in your files, as well as being sent to you via email.
4. Prioritise

Time vs Setup

Your company might have a limited timeframe to set up lightning, or you may be happy to take as long as needed to complete all the changes required before going live. If you have a limited timeframe, you will need to prioritise what features and VF pages are most important. Are there any components or features that can be rolled out after going live?

Know when to get help!

For some companies, the time associated with the migration is too high a cost. Migration time depends on many variables (Number of employees, multi-cloud, number of Visualforce pages, etc). Accelerators can help small to mid-size businesses set up fast, while full Lightning transition services from Salesforce partners will benefit enterprise level companies.

5. Sandbox

The best way to start a test and isolate changes is in a designated ‘Sandbox’. This way changes, components and apps can be trialled and tested before implementing them into production. This way you can eliminate any errors or bugs before going live, which in turn will eliminate downtime for users.
6. Test, Test, Test.

Next, it is vital to double check and test all features. The objective of the testing phase is to validate the quality of the Salesforce Lightning solution and confirm that the functionality works. You do not want to come out of this project disappointed and unable to fulfil your goals.

7. Roll out

Your rollout is one of the biggest steps in your plan. You do not want to send a brief email to all staff telling them to switch to lightning. You will need to train managers, who will intern train their employee group. As we recommended above, the best way is to start is with one selected group and then branch out to other sections of the company.

8. Document

Before, throughout and after the lightning transition, you will want to document the process. This can help, not only if any errors arise but to also train new employees who may be inexperienced with lighting or might be involved in future updates of the solution.
KEY TAKEAWAY POINTS:

• Fast, smarter and modern.

• Productivity - Faster activity time equals a higher feeling of accomplishment, as well as a higher volume of work.

• For anything left behind in Classic, it was left for a good reason - a better, improved version or alternative is available in Lightning.

• 341% ROI in 3 years.
PEXLIFY LIGHTNING ACCELERATOR

1: EVALUATE
Readiness Check, Consultation, and Proposal

2: DESIGN
Analysis - Classic Org, on-site workshops, prototypes, Change Management Strategy, Statement of Work and Prototypes

3: BUILD
UI Build, Demo of features, Users Profiles Set-up, Lightning Experience Console Setup, Configure the Lightning components

4: GO-LIVE
Execute Change Management Strategy, User Acceptance Testing, Remediation of any issues identified in UAT, Go-Live - Launch new Lightning Experience

5: ADOPTION
Review of Performance, User Surveys, Executive Summary

Why choose us for your Lightning Migration? Read more here.
ABOUT PEXLIFY

Apex + Simplify = Pexlify

Pexlify is a Platinum Salesforce Partner and a leading provider of Salesforce.com solutions across Europe. Our experienced team help clients eliminate system inefficiencies, harmonise processes between teams, and enhances reporting capabilities.

We pride ourselves on our technical, project and business analysis skills which enable us to solve the most complex business requirements. We work closely with customers to unlock value and build strong, lasting relationships that help them succeed using Salesforce - the world’s #1 CRM platform.

What our customers say:

“Delighted to have found such a great partner in Pexlify Enterprise Solutions... Fantastic team that delivered an outstanding solution in QuoteForce”

Read more about our current customers here.