Questions to Ask Before A
Salesforce Lightning Transition

Index

Salesforce Lightning, the set of tools, interfaces and experiences optimized for speed and efficiency, offers a significant upgrade over the Classic version. It offers sleek, modern and intuitive user interface, enabling ease of use and development. The UI facilitates a more natural way of working, with increased productivity. The easy drag-and-drop interfaces allow customized app building, on the fly. Lightning Components, being more modular compared to Visualforce pages, are easily reusable and highly secure. In all, Lightning offers 25 new features, with significant enhancements from the existing state.

Transition to Salesforce Lightning should be a no-brainer, considering the benefits on offer. However, upgrading to Lightning is not a simple matter of unplugging the old Salesforce Classic, and plugging in Salesforce Lightning. Embracing Lightning requires a radical overhaul of the existing approach. As it is with any change, it involves the destruction of the existing ecosystem, and establishing a new one. The process is sure to involve some stress and chaos.

Here are the top questions to ask before embarking on a Salesforce Lightning transition, to cope with the change and effect a seamless transition.

1 Are you aware of the functional limitations?

Salesforce Lightning, the set of tools, interfaces and experiences optimized for speed and efficiency, offers a significant upgrade over the Classic version. It offers sleek, modern and intuitive user interface, enabling ease of use and development. The UI facilitates a more natural way of working, with increased productivity. The easy drag-and-drop interfaces allow customized app building, on the fly. Lightning Components, being more modular compared to Visualforce pages, are easily reusable and highly secure. In all, Lightning offers 25 new features, with significant enhancements from the existing state.

Transition to Salesforce Lightning should be a no-brainer, considering the benefits on offer. However, upgrading to Lightning is not a simple matter of unplugging the old Salesforce Classic, and plugging in Salesforce Lightning. Embracing Lightning requires a radical overhaul of the existing approach. As it is with any change, it involves the destruction of the existing ecosystem, and establishing a new one. The process is sure to involve some stress and chaos.

Here are the top questions to ask before embarking on a Salesforce Lightning transition, to cope with the change and effect a seamless transition.

2 Is there a Change Management plan in place?

Making a transition to Lightning is change, and requires a change management plan.

The first element of a change management process is clear-cut communications. People hate change. Clear cut communication is essential to assuage them, and convince them that the change is for the better.
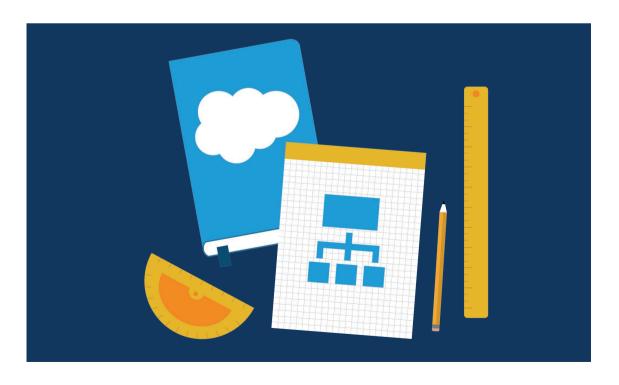
The second element of the change management process is people management. Consider the impact transition will have on the workforce, and prepare for the same. The success of any change initiative depends on the extent to which the

workforce supports the initiative. The workforce, being the end users of the system, is the direct beneficiary, but also the one that will bear the brunt of the change. Unless the workforce adapts to the new paradigms wholeheartedly, the exercise will end in a failure, no matter what is promised at the end of the tunnel. Support the workforce with awareness interventions, education, training, and any other intervention required.

The third element of change management is a gradual approach. Change has more chance of success when implemented gradually. Lightning is not a big bang, where the transition has to happen all at once. The best approach is to make a transition to a small set of committed users, make improvements, and roll it out to the entire team after ironing out the kinks. Also, there will invariably be a tendency, especially among admins, to switch back to the more familiar and hence quicker Classic. The training notwithstanding, it will take time to get used to Lightning, and as such it makes sense to run both Classic and Lightning concurrently for some time.

The fourth element of change management is to review work in progress. Enterprise with custom development or new AppExchange apps in the works would do well to stop and reconsider a Lightning delivery approach. Using Lightning Ready AppExchange solutions could reduce deployment time, besides making things overall efficient.

3 Are the Impacted Stakeholders Identified?

The change will not affect everyone equally. In fact, the impact of the change will not be in proportion to the extent to which the workforce or stakeholders embrace the new paradigm. Find out the employees and other stakeholders impacted by the implementation, and offer specific plan and strategies that will provide relevant support during the change process. Consider this – what is the organization's current level of process? What is the level of its system expertise? Should you make any geographical considerations before applying wide-ranging changes?

Successful Lightning transitions require strong leadership, backed by active support from the top management. Identify champions and super users who can help the migration be a success. The best initiatives are heralded by a champion or a highly committed employee, who should lead from the front, to set benchmarks. Securing the buy-in of affected users is essential to roll out the migration keeping with the project schedule, training plan, potential budget, and communications strategy.

4 Is there an action plan in place?

The core of a successful approach to Lightning migration is instituting and adopting an action plan.

Formulate a roadmap to get the Salesforce Org ready. The depth and detail of the plan largely depend on the size of the Org and the number of functional groups involved. A migration for a small team involving 10-20 users would be far easier and less formal compared to a migration plan involving hundreds of users spread across a dozen business units.

The first step when starting the migration exercise is to take stock of the Org, and verify if the required features are already compatible with the Lightning experience.

The Salesforce Lightning Migration Assistant, a set of tools including a Readiness Report and a Preview Mode is a good resource to get started. Applying these tools helps to determine if the org is ready for Lightning, and if not, the "gaps."

The Lightning Experience Readiness Report tool scans the configuration, user profile, objects, components, and other variables in the org, to generate a report highlighting areas of the org ready for migration, and areas not ready for migration. The report reveals functions not yet available in Lightning, and functions which require adjustments before it is ready for Lightning.

The preview function offers a "test drive" to the Lightning Experience. The preview is not a simulation, but rather the live Org, in Lightning. Changing data and configuration will stick.

Document the must-have features, and identify gaps, or required features not yet there in Lightning. Each release of Lightning will make the gap smaller and smaller. The action plan requires a commitment, and timeline to re-do the required things, as evident from the Lightning Experience Readiness Report and the Preview. Create a timeline to get the work done, and fix a launch date. Fix milestones for each stage.

5 Have Customization Been Reconciled to Lightning

The customization of a company's Salesforce implementation may not transfer into Lightning automatically. Likewise, in-line Visualforce pages, often applied for custom analytics and accessing custom-built features, require conversion into Lightning Components. Migration to Lightning requires making all custom buttons, reports, and other customization in the org that are developed over time Lightning-compatible. Some of the things that would invariably require re-doing before migrating to Lightning include Custom Buttons, JavaScript, Visualforce pages, Apex, Triggers, and S-Controls. Some apps may also have to be rebuilt. Addressing such technical requirements may require diverting valuable internal development resources to rework code that performs perfectly well in Classic. As such, enterprises need to undertake a cost-benefit analysis, weighing in the positive business impact the upgrade will bring about. If there are too many feature gaps, it may make sense to wait awhile until the required features are available. On the other hand, if there are only a few obstacles, and that too limited to a particular team, such as Marketing, it makes sense to roll out Lightning for specific teams, and extend it to other teams as soon as such teams are ready.

6 Are users trained for the migration?

Moving from Salesforce Classic to Salesforce Lightning invariably involves a learning curve. Even Salesforce says working in Lightning initially can make users feel "discombobulated."

Lightning and Classic are fundamentally different. For end-users, the biggest difference is the change in the UI. The change is not just rearranging the pieces, but rather a complete overhaul of the layout to a very modern UI. Users will have to learn a new way of working. On encountering Lightning, many users will feel de-skilled, and require support. In fact, some users will have to be trained the same way they were trained to use Salesforce the first time.

However, Lightning migration differs from training new users for Salesforce. New users are trained in Salesforce concepts and how to do their job using Salesforce. In Lightning migration training, users are rather trained in the new features of the UI, what happened to the existing features, and why. For instance, Sales Path and enhanced dashboards are totally new features in the Lightning UI, and the training would inculcate how to use these features for optimal benefit.

Salesforce offers Trailhead Lighting Experience modules, which offers a good base for migrating users to get started. Three Trailhead modules: Migrating to Lightning Experience, Get Started with Lightning Experience – Administrator, and Make a move to Lightning Experience – Business Users will help users migrate from Classic to Lightning Experience smoothly. Enterprises would however also need to offer customized modules, to suit their specific needs and work patterns.

A critical area to consider is the level and method of training required. There are several methods to educate and train the workforce. The two broad streams are instructor-led training and self-paced eLearning. Choose an option which best suits the workforce.

7

Is there a method to measure the success of the transition?

Not all efforts succeed. The measure of success cannot be gained solely by the fact the workforce is using Lightning. There should be a method in place to ensure the migration to Lightning has succeeded, and the enterprise is leveraging the benefits of the exercise. While there is no fixed measuring scale for success, keep an eye on usage, effectiveness, adoption, and user-perception metrics.

The tremendous benefits and power of Lightning mean it is not a question of "if," but rather "when" to making a transition to the Lightning Experience. However, Lightning is still work-in-progress. It also requires a change of mindset and a different set of analytical skills. The decision regarding when to migrate, and how to migrate, has to be a thought-out one. Users would do well to defer migration until Lightning is ready for them, and they are ready for Lightning. Salesforce will continue to support Classic until Lightning is ready to take over completely.

Reference:

https://hub.appirio.com/cloud-powered-blog/8-questions-to-ask-before-a-salesforce-lightning-transition

https://developer.salesforce.com/page/Lightning_FAQ

http://pages.mail.salesforce.com/getingstarted/lightning/plan-your-experience-rollout/

https://automationchampion.com/2017/09/13/migra ng-from-salesforce-classic-to-lightning-experience/

http://searchsalesforce.techtarget.com/tip/Migrating-from-Salesforce-Classic-to-Salesforce-Lightning

https://www.shellblack.com/ebooks/salesforce-secret-formula-migrating-from-classic-to-lightning/

https://www.bluewolf.com/bluewolf-now/4-questions-ask-when-transitioning-salesforce-lightning

https://trailhead.salesforce.com/en/modules/lex_migration_rollout/units/lex_migration_rollout_educating