Get Ready for a Whole New Way to Sell:

Launch Lightning Faster with Salesforce Accelerators

The Power of Lightning

When the first CRM systems were created, they were primarily a tool for managers. A sales manager would monitor the basic functions of the team and have some sense of what the sales cycle was like throughout the quarter. Fast-forward to present day, and CRM systems are light-years ahead of where they began. At the same time, the sales world continues to change constantly, and so do the demands of customers.

With all of that as inspiration, Salesforce has evolved – again – with the introduction of Lightning. **Lightning makes it easier than ever *to sell faster, smarter, and exactly the way you want to.***

Accelerate Your Lightning Implementation

We want your Lightning implementation to be as quick and convenient as possible. That's why we created Salesforce Accelerators for lightning-quick, lightning-focused consulting engagements with Salesforce specialists. We have over a dozen Accelerators to help you adopt Lightning quickly and use its key capabilities right away.

In the following pages, we'd like to show you the powerful new Lightning experience, introduce you to two business leaders who used Accelerators to get Lightning up and running quickly and successfully, and walk you through the quick and easy steps for starting your own Accelerator.

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Chapter 1

Sell Faster

Today's sales game is all about speed. Many times, a competitive deal will go to the most responsive sales rep when all other things are equal. However, getting there first with everything you need to close the deal is challenging. With the help of our new Lightning experience, you can turn that challenge into a business-as-usual experience.

Never Lose Data, Never Lose a Deal

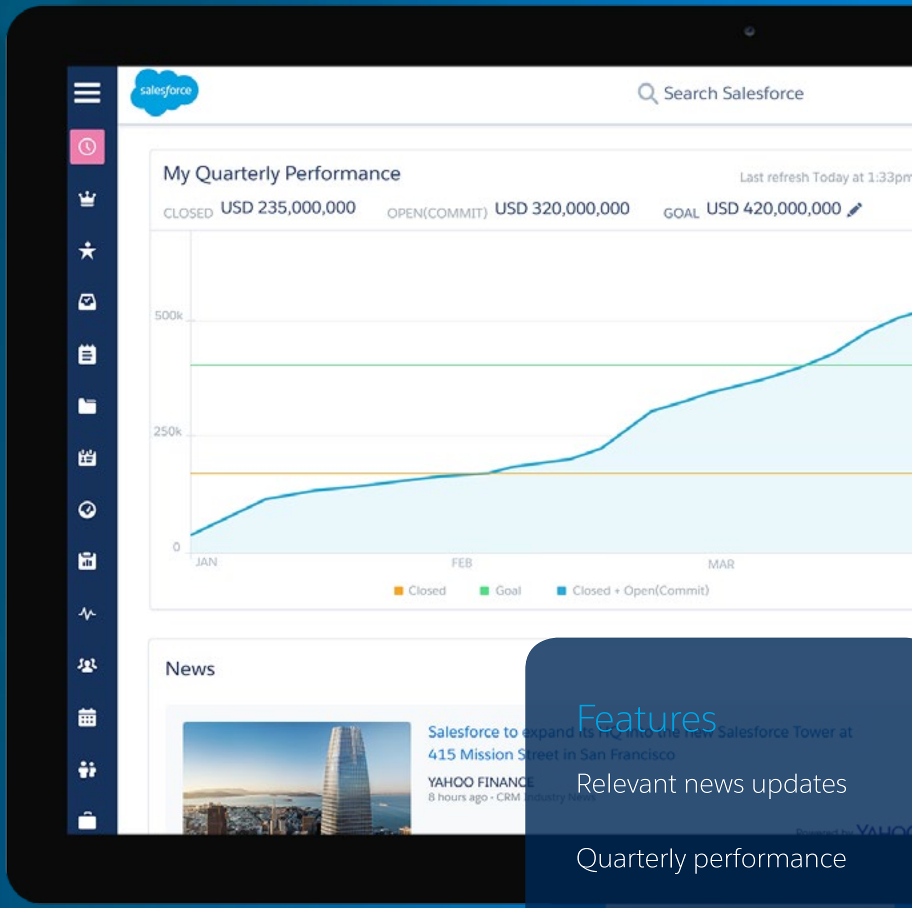
For too long, CRM systems have been reactive. Having a record of every interaction with a prospect is invaluable to a sales professional, but the process of logging that information could only be done manually, and therefore it was incredibly time-consuming. What if all that useful information could be recorded automatically?

Well, you don't have to wonder. The Lightning experience knows the information that will be most helpful to you throughout the sales process and records it automatically so you never lose data–and never lose a deal.

Lightning is all about being proactive

This new brand of proactive CRM extends far beyond eliminating manual information entry. The Lightning experience also provides you with the most up-to-date information, right when you need it. Wondering how you are performing relative to this quarter's quota? No more clicking and filtering to get the answer. A simple chart will show your progress, straight from the home screen. Want a list of the day's tasks and appointments? You've got it. Top deals in the pipe? No problem. The Lightning experience even surfaces relevant news articles relating to your open accounts so you're always in the loop.

Having all this information delivered directly to you instead of manually recorded or arduously tracked down means one thing: **You spend more time selling.**



Features

- Relevant news updates
- Quarterly performance
- Assistant
- Top deals
- Task reminders
- Account updates
- Recent accounts

Home Screen

Hit the ground running everyday with all the information you need, from the moment you open Salesforce. Featuring account updates, top deals, task reminders, quarterly performance, relevant news, and a personal assistant to make sure you never miss a thing.

Focus Sales on Your Most Important Leads

As CRM solutions have evolved in the last few years, there has been a dramatic influx of new data. Marketing automation solutions are providing dynamic new insight into how and when prospects interact with your company. However, all that data means very little if it can't be called up on demand. The Lightning experience doesn't just make finding the right information easier–it makes it instantaneous.

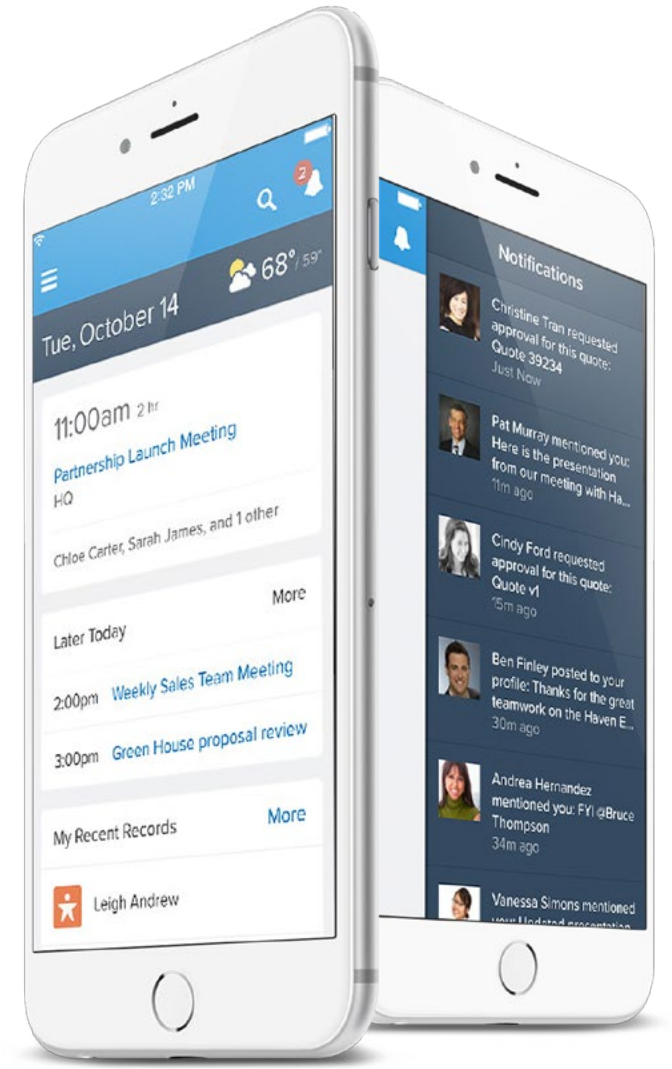
When a prospect completes an action, like opening an email or visiting your website's pricing page, Salesforce immediately alerts you in a real-time feed that now is the perfect time to reach out to your prospect. This allows your team to focus its selling efforts on the leads most likely to close–and do it at the best possible time.

Prospect activity isn't the only aspect of marketing automation that's being updated and streamlined by the Lightning experience. Lead nurturing with drip email campaigns has also gotten a lot easier. Sales reps can now assign leads to existing nurture journeys, even from their phones. Marketing can collaborate or lead the creation of these nurture journeys to ensure that prospects are receiving the freshest and most useful marketing content. Meaningful collaboration between sales and marketing results in a better overall experience for the customer.

Sell from Anywhere, On Any Device

Not too long ago, being away from your computer meant you were only armed with what you were able to cram into your bag or briefcase. Now, with a mobile CRM solution, you can access all your customer and company data at any time, allowing you to keep in touch with more prospects and collect new and relevant information in real time. Being able to update your CRM on-site instantaneously replaces that tedious task at the end of the day with a simple process that ensures you always have the most current information at hand. Access to this information provides sales reps with a number of advantages.

The tools you use most should work the same across all of your devices and feel like a consistent experience on every screen. With Salesforce responsive design, you get the same experience no matter where you are or what device you are using.

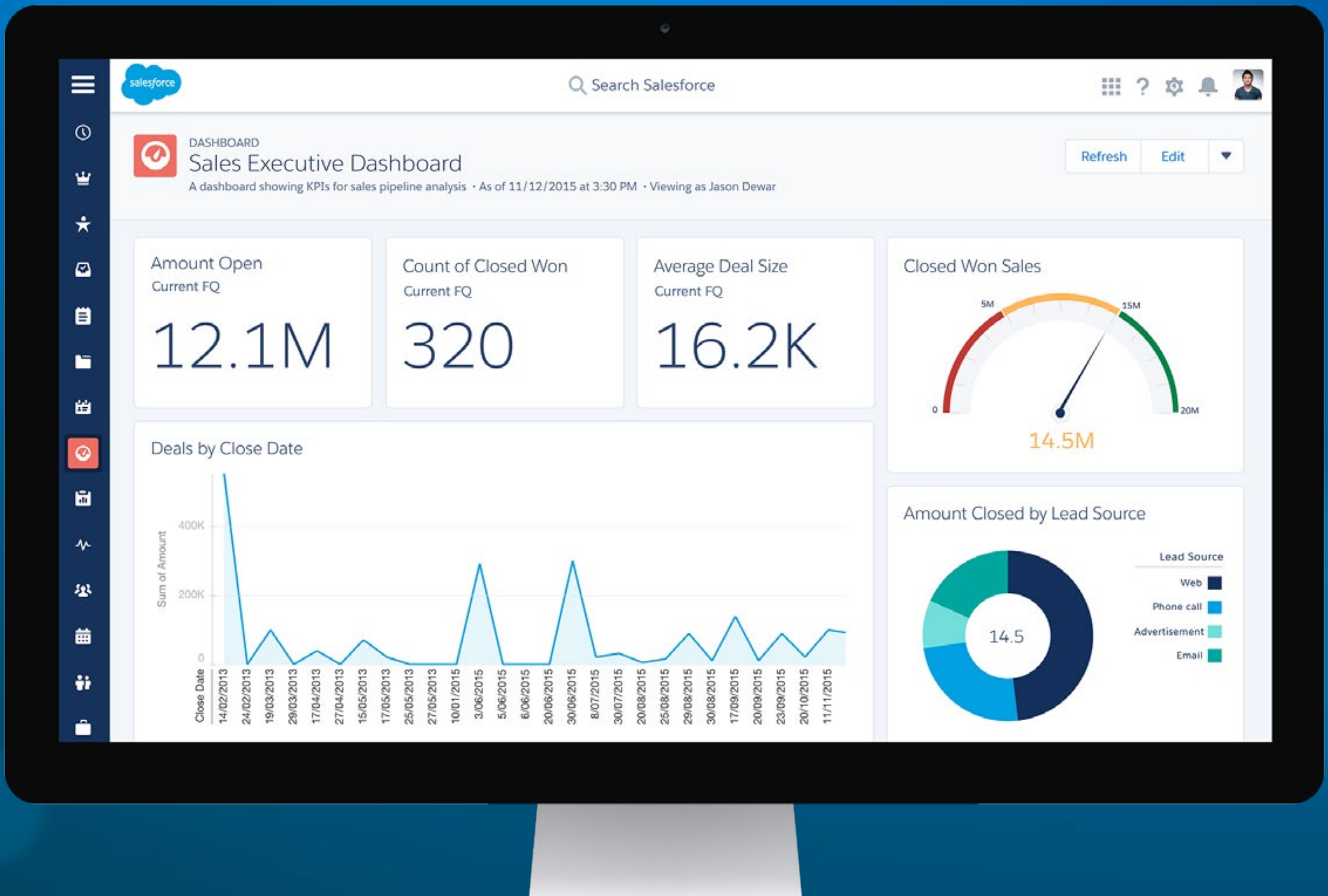


Mobile-First

Get the same great Salesforce experience, no matter where you are or what device you're using.

Redesign Highlight: Sales Dashboard

Dashboards have been one of the most popular features of Salesforce since they were first introduced. The new Lightning experience improves upon the dashboards you already know and love, and includes new features that users have been waiting for. Tired of the standard three-column layouts for Salesforce dashboards? Well, Lightning allows you to add columns to your heart's content. Easily resize elements across columns and rows with a simple click and drag. Lightning also features updated designs to the graphs and modules you're familiar with, and adds a few new ones.



Features

More than the standard three columns

Redesigned graphs

New modules

Improved customization

Chapter 2

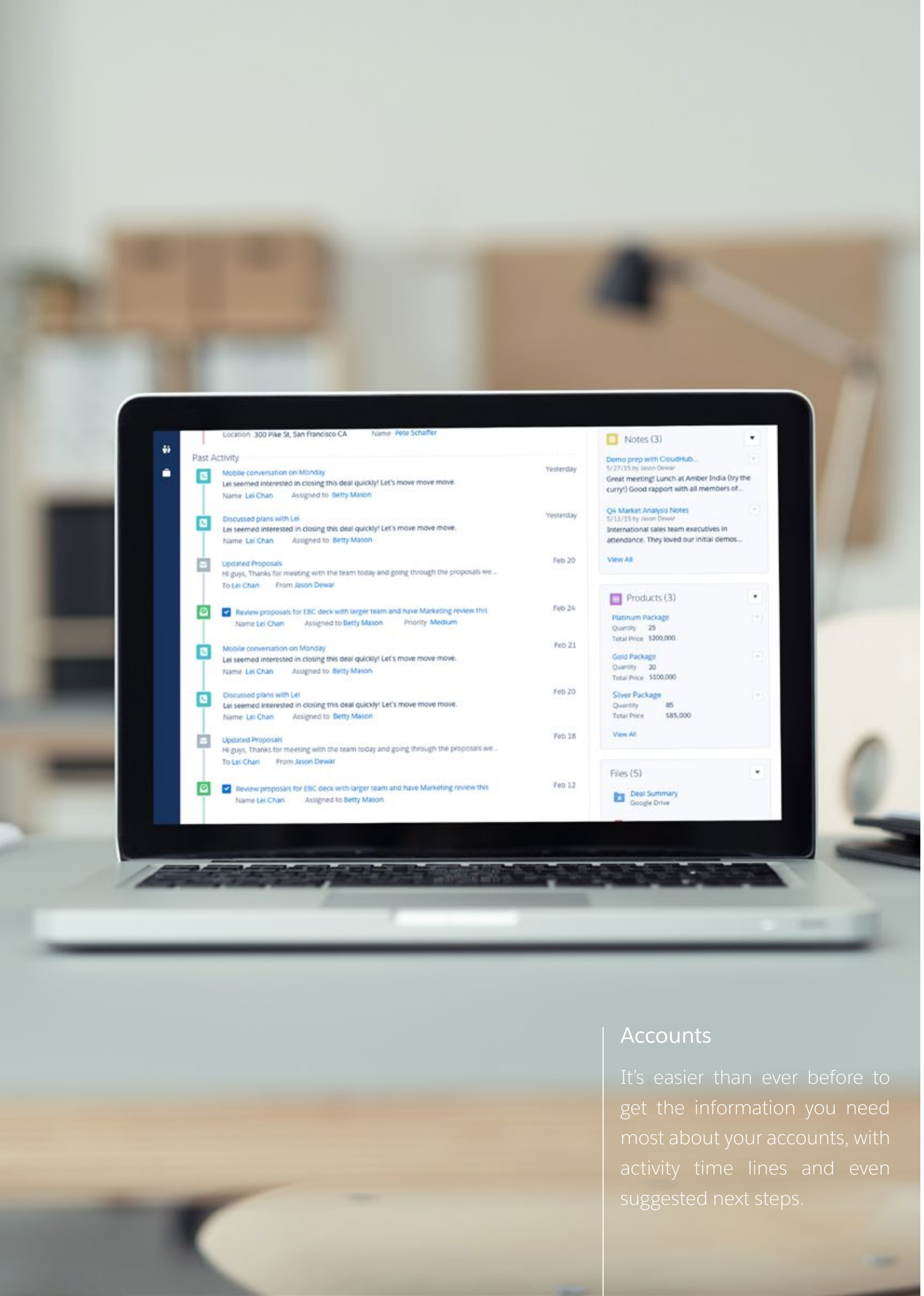
Sell Smarter

There's no doubt that we are living in an era where everything must be quantified. Terms like "big data" and "analytics" are being thrown around in every industry and for every job function. All this data holds a lot of promise for today's business professionals. The reality of improved accuracy, the prospect of increased efficiency, and the dream of improved efficacy are all on the minds of today's modern professionals as they rush to embrace this new data-driven era. At the forefront of all this clamoring for more data is the sales organization. At the end of the day, companies should look to leverage data first with their sales teams.

However, many companies don't know where to start when looking to incorporate data into their sales operations. With the Lightning experience, Salesforce has finally made data front and center. The Lightning experience makes data more accessible across all aspects of your CRM, making every decision more informed, every insight more impactful, and every action more meaningful.

Dashboards

Dashboards on Lightning are more customizable and beautiful than ever before, allowing you to leverage your data for smarter sales and more success.



Accounts

It's easier than ever before to get the information you need most about your accounts, with activity time lines and even suggested next steps.

Turn Every Interaction into an Opportunity

Prospects are now engaging in more ways and through more channels. They expect to have their sales experience tailored to meet their needs at every stage and on any channel. This means modern sales professionals need to not only understand where their prospects are in the sales process, but how to tailor their approach to each stage. The Lightning experience makes this process a breeze by helping identify sales stages, surface the right data, and suggest guidance. It also gets you ready for any selling moment. And nowadays, those moments can happen at any time and at any point along the sales cycle.

Every sales rep knows that each stage of the buying process requires a slightly different approach. That's why Lightning breaks down the right steps to take at each stage and the data you need to take action. Moving a deal forward is the most important part of any sales activity and was once the biggest challenge–but not anymore. From suggested next steps to the perfect piece of content, Lightning features make moving your deals through the pipeline that much easier.

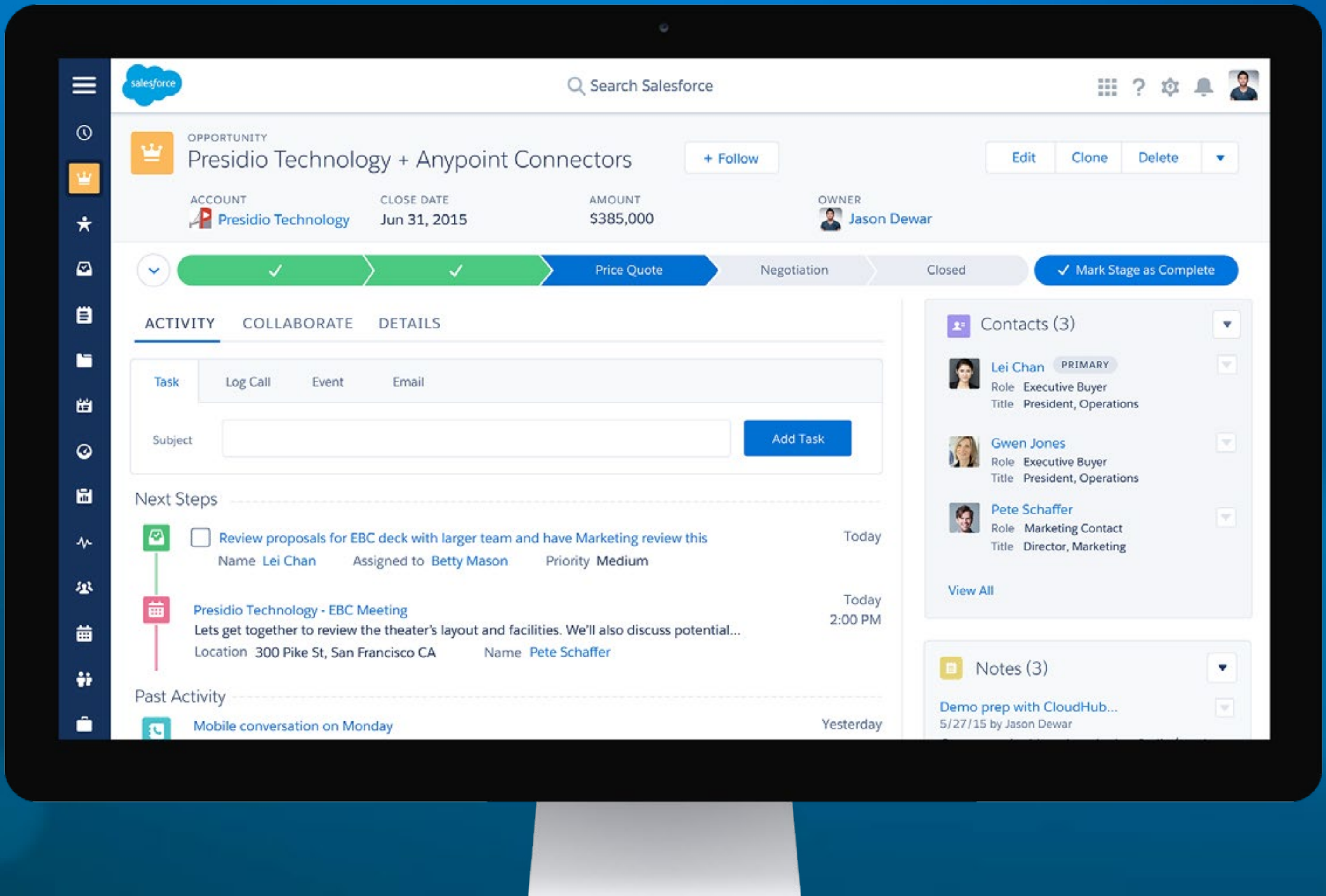
Gain Insight with Real-Time Analytics

Analytics has long been the domain of IT or specialized data teams: It's viewed as far too complex to be used by the average sales professional. But as the amount of accessible data has skyrocketed, analytics has become too valuable a tool to keep sequestered to the back office. Salesforce is bringing analytics to everyone with the Lightning experience.

Want to identify opportunities to upsell within your existing customer base? No more submitting a request to the IT department and patiently waiting a few weeks. You can filter through data in seconds and drill down to the insights you need on your own, all from right inside Salesforce.

Redesign Highlight: Opportunity Workspace

The Lightning experience provides a whole new view of your entire pipeline. Called the "Opportunity Workspace," this new screen provides everything you need to close a deal. Understand at a glance where your deal is in the sales funnel with helpful visualizations. Get suggested next steps to keep deals moving. Log calls and send emails from inside the account workspace to automatically record events in the activity time line. The Salesforce record for an account is no longer just a page to reference–it's now command central for closing the deal.



Features

- Next steps
- Activity history
- Call and email from inside account
- Easy collaboration

Chapter 3

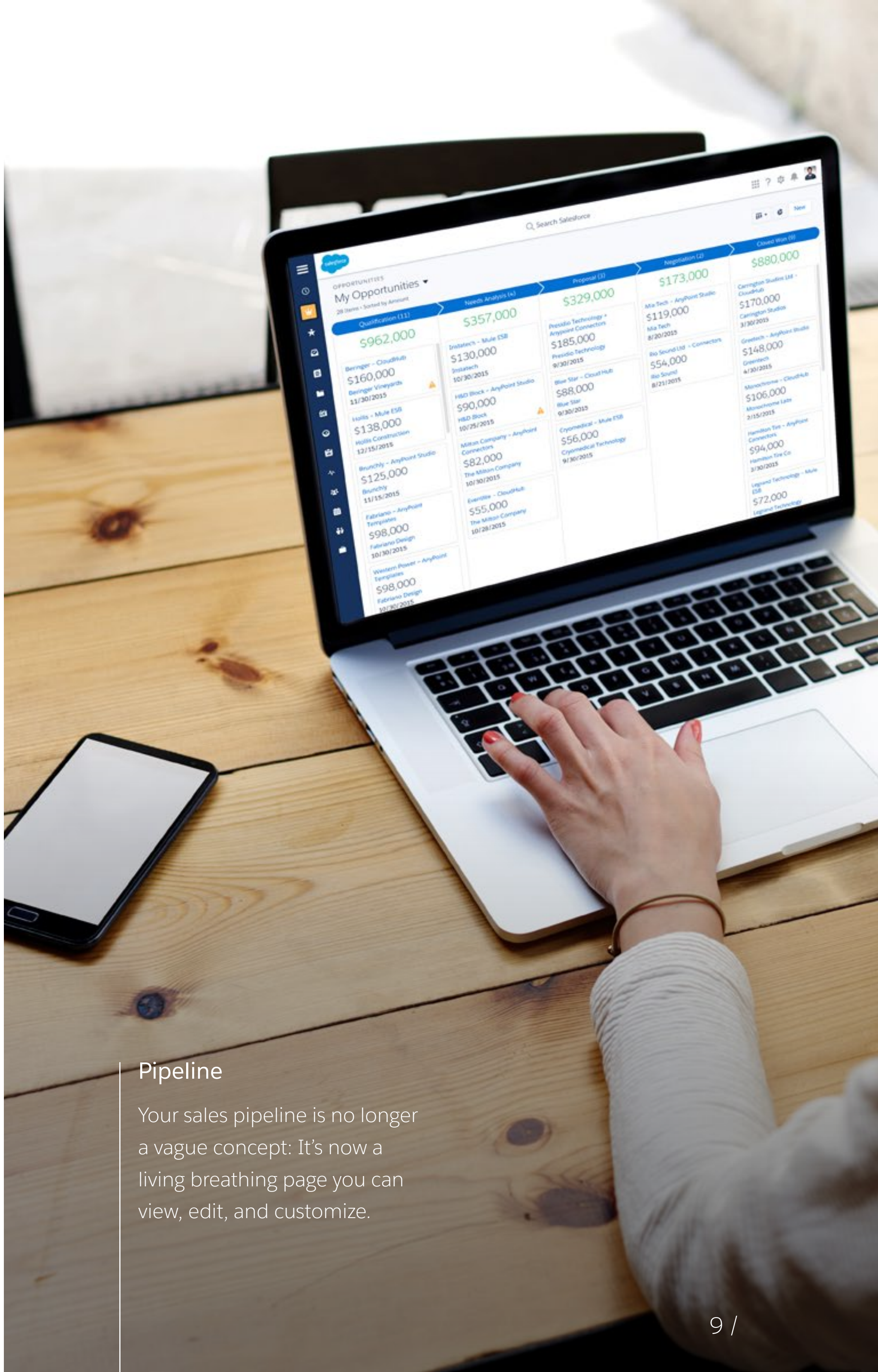
Sell the Way You Want

For too long, sales organizations have tailored the way they sell to match their CRM when it really should be the other way around. That's why, above all else, the new Lightning experience was designed so that anyone, at any time, can customize his or her CRM, no matter the team, no matter the sales process. This allows our customers to be more effective, more impactful, and more successful.

Get a Central View of Your Customer

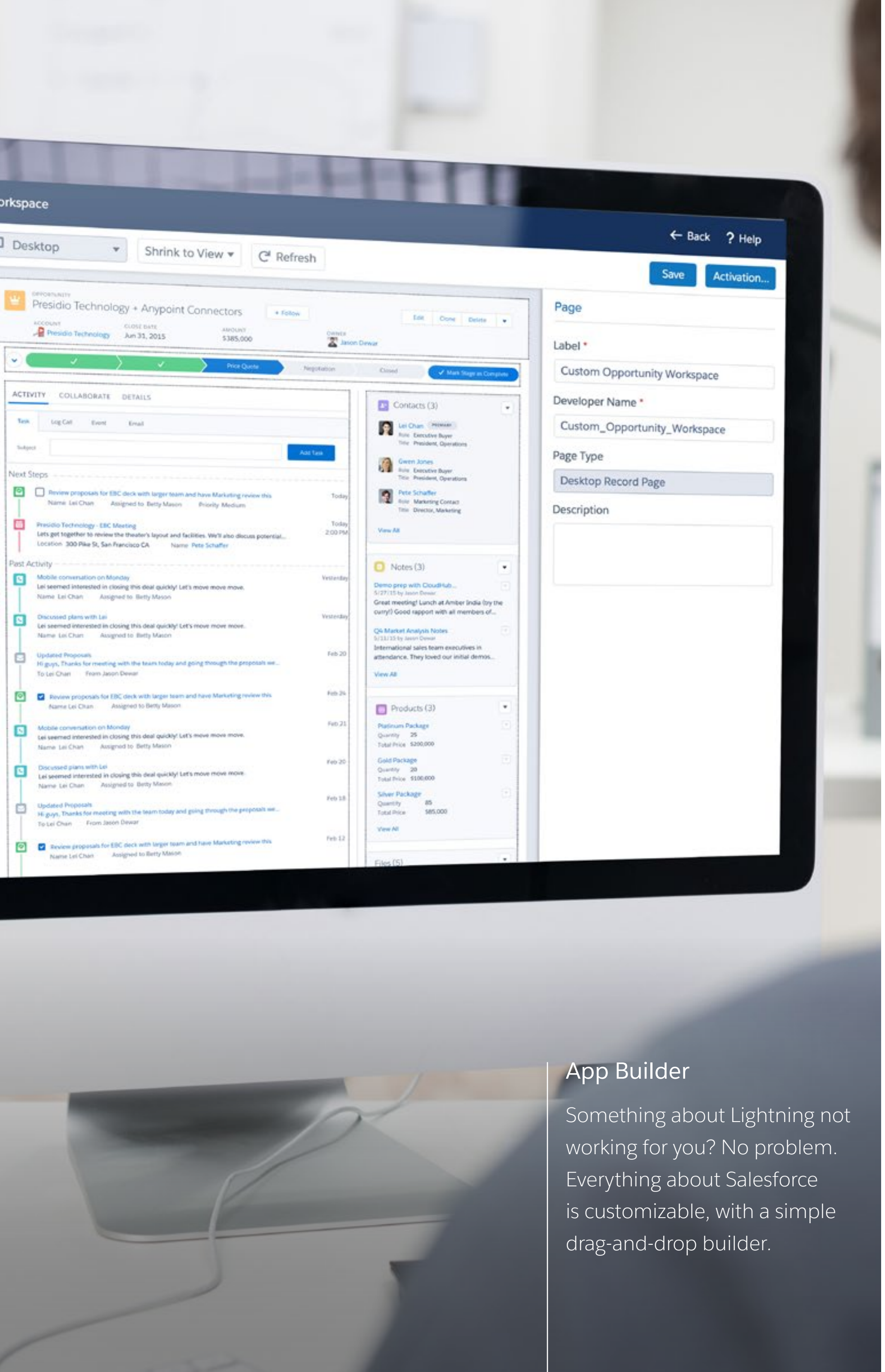
Recent research from CEB suggests that with the changing business environment, companies that rely on individual performance rather than team selling will see negative results. The study found that over a period of 10 years, from 2002 to 2012, the impact an individual's task performance has on a company's profitability dropped from 78% to 51%. In that same period, the effect of employee collaboration and "network performance" increased from 22% to 49%.

Collaboration allows your reps to tap into their team and network for advice, information, and expertise on the fly. Modern sales teams are more collaborative, with a team atmosphere that allows them to leverage their collective knowledge to outperform salespeople that are less connected.



Pipeline

Your sales pipeline is no longer a vague concept: It's now a living breathing page you can view, edit, and customize.



App Builder

Something about Lightning not working for you? No problem. Everything about Salesforce is customizable, with a simple drag-and-drop builder.

The sales process no longer starts and ends with a sales pitch. The content created by marketing is just as important as the sales pitch, and the service your new clients receive after the deal has closed creates brand advocates who can uncover even more opportunities. To view sales as an isolated department does a disservice not just to your sales team, but to your customers. This is why Salesforce provides a 360-degree view of your prospects, from their first marketing touchpoint to their most recent service inquiry.

Customize Sales Cloud to Work the Way You Want

Sales tools need to make the daily functions of the sales team easier to perform with greater efficiency. Nearly everything about the app is customizable, from the look and feel to the apps and actions you can take. This means any learning curve is basically nonexistent. Your sales team can log in and instantly feel comfortable. The user interface will look familiar. The actions and verbiage will be consistent.

Set Up Custom Actions in a Blink

Many of the actions a sales rep takes each day can be very repetitive. You can easily create custom actions based on the activities you or your users need to perform most often. Create time-saving actions in no time. Choose from a library of popular custom actions or build your own. Tailor relevant actions for different roles. Keep your most important custom actions at the top.

Create Any Custom App and Deploy Instantly

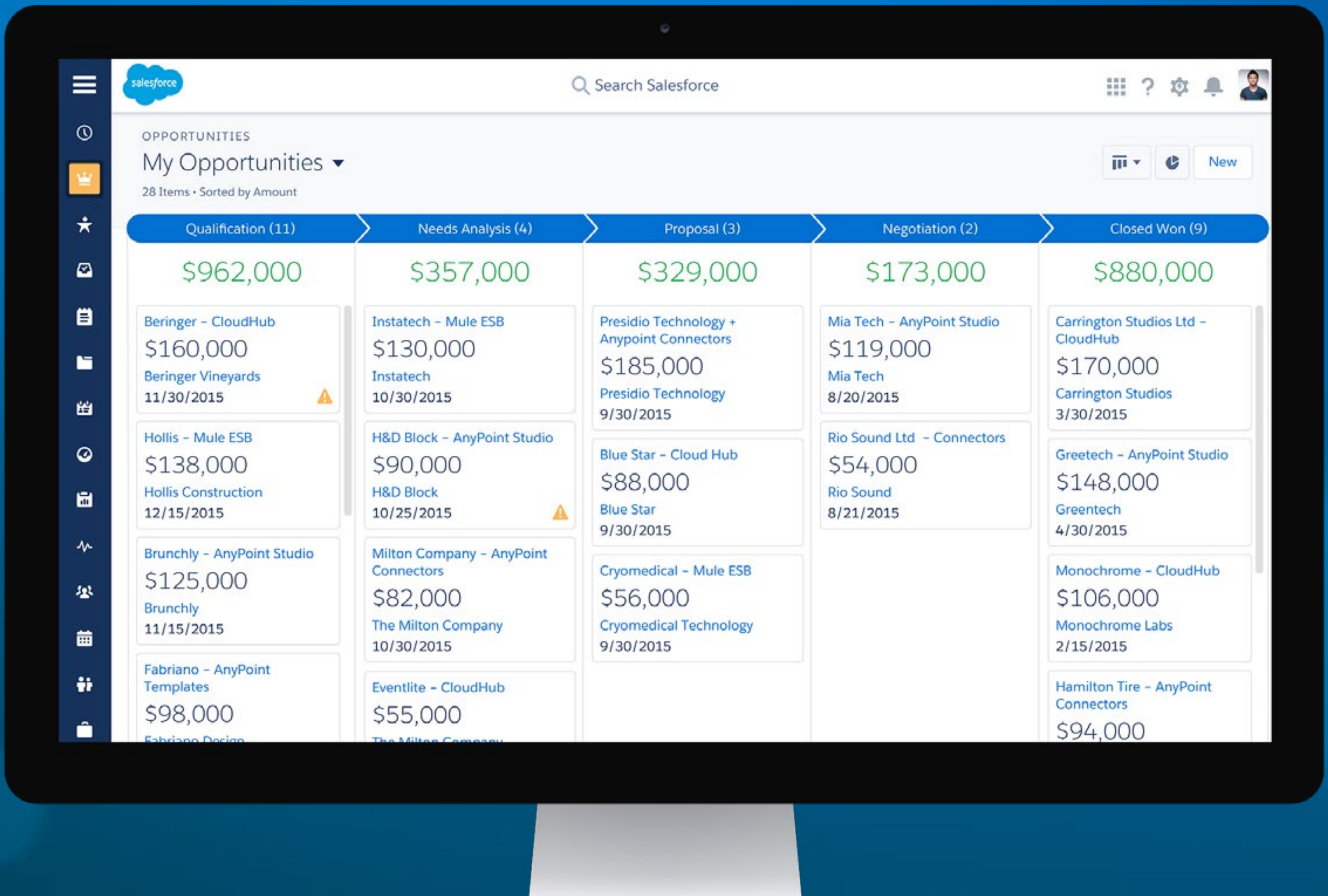
Custom actions not enough for you? Try building entire custom apps you can use directly in Salesforce. Easily deploy all your custom objects, fields, and any apps you've integrated or built declaratively. Build new apps with clicks instead of code–no HTML, no CSS. Simple drag-and-drop builders make developing a custom app the work of minutes, not months. Quickly automate key processes with custom apps and make your sales team more efficient and powerful.

Find the Perfect Apps for Your Business.

One thing that has always set Salesforce apart from the competition has been AppExchange. You can implement thousands of third-party apps with the click of a button, making the functionality and customization of your Salesforce account infinite.

Redesign Highlight: Pipeline Board

For too long, a sales professional's pipeline has existed only as a vague idea of his or her active accounts and their current statuses. The Lightning experience finally brings it all to life with the Pipeline Board, so you can finally understand exactly how your deal is progressing and where it's heading. The Board shows you how much value you have in each stage of your sales cycle, which opportunities are in each stage, and what you need to do to move them to close. Easily drag and drop opportunities across stages and customize the Board to match your team's sales cycle.



Features

Easily drag and drop opportunities across stages.

Stage values calculate automatically.

Get alerts on accounts that need attention.

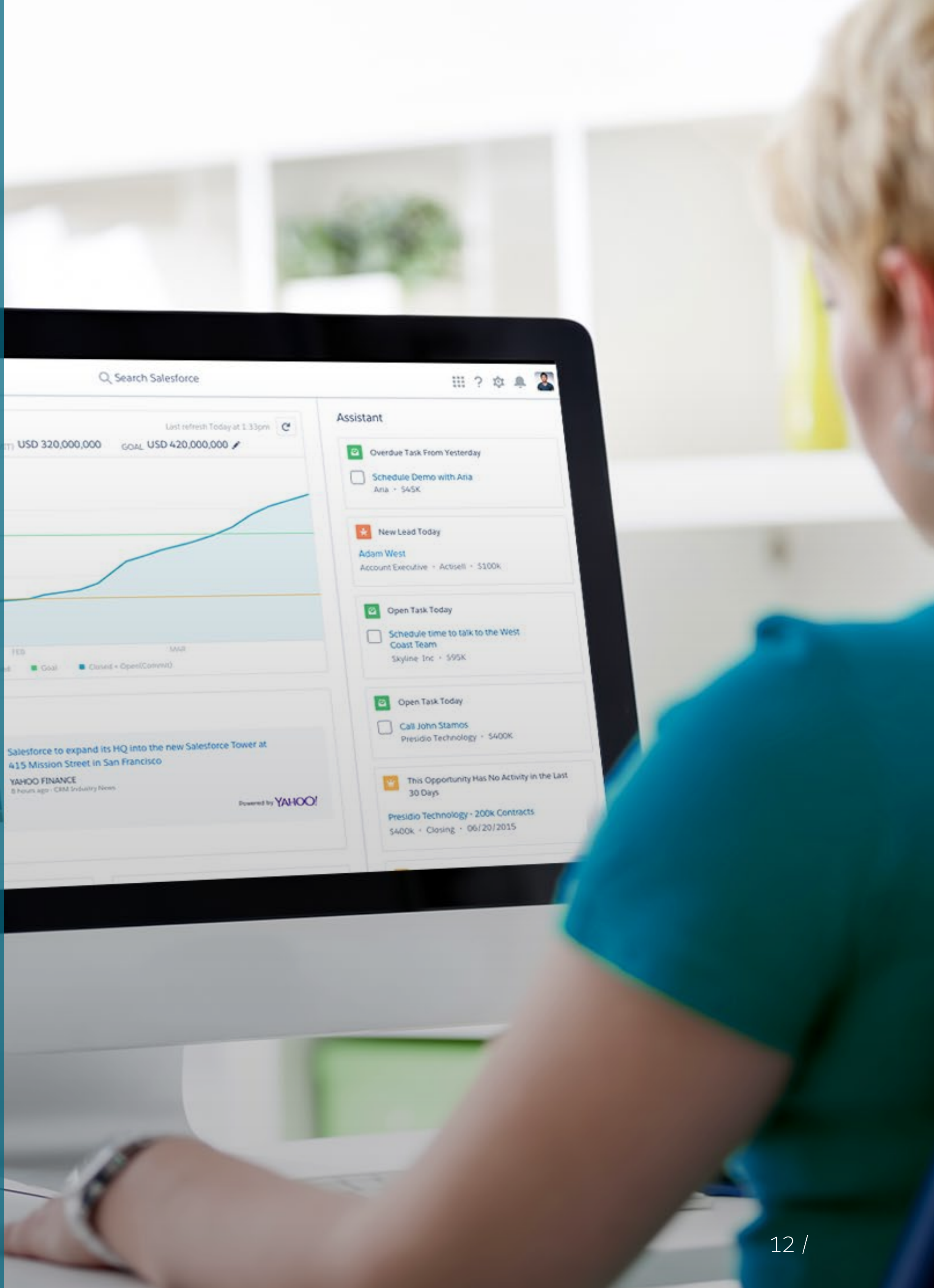
Launch Lightning Faster

Ready to make the move, but concerned implementation will take too long? Lightning Accelerators can help you get started quickly and get the most out of the new experience right away.

Accelerators are one-on-one, collaborative working sessions with Salesforce Specialists, focused on helping you solve very specific business challenges – without requiring a lengthy scope of work or major time commitment.

Within just a few weeks, a Salesforce expert will help you configure Lightning, customize it for your business, and get your team on board. The result? You'll deploy faster so your users can start using Lightning sooner.

In the next pages, you'll see how two business leaders used Accelerators to propel their Lightning launch and how you can get started with an Accelerator lightning-quick.



Mitchell kick-starts success with Lightning Accelerators.

Mitchell processes more than 50 million transactions for more than 300 claims payers and more than 30,000 repair centers annually. The company had been using Sales Cloud since 2005, but when Salesforce released Lightning in 2015, leaders at Mitchell were impressed with the clean user interface and thought the new experience would be a good opportunity to re-engage users. Pauline Mulvey, Vice President of Enterprise Business Technology for Mitchell seized the opportunity to launch Lightning among a group of new sales reps who weren't familiar with Salesforce.

Mulvey booked the Lightning Configuration and Customization Accelerator to get the most out of the new experience. The Accelerator, a series of short work sessions led by a Salesforce specialist, helped Mitchell leadership quickly create reusable Lightning components to build apps and pages, and automate processes.

With Sales Cloud Lightning, sales managers can create dashboards and reports without having to wait on IT, and sales reps can see across all business units.

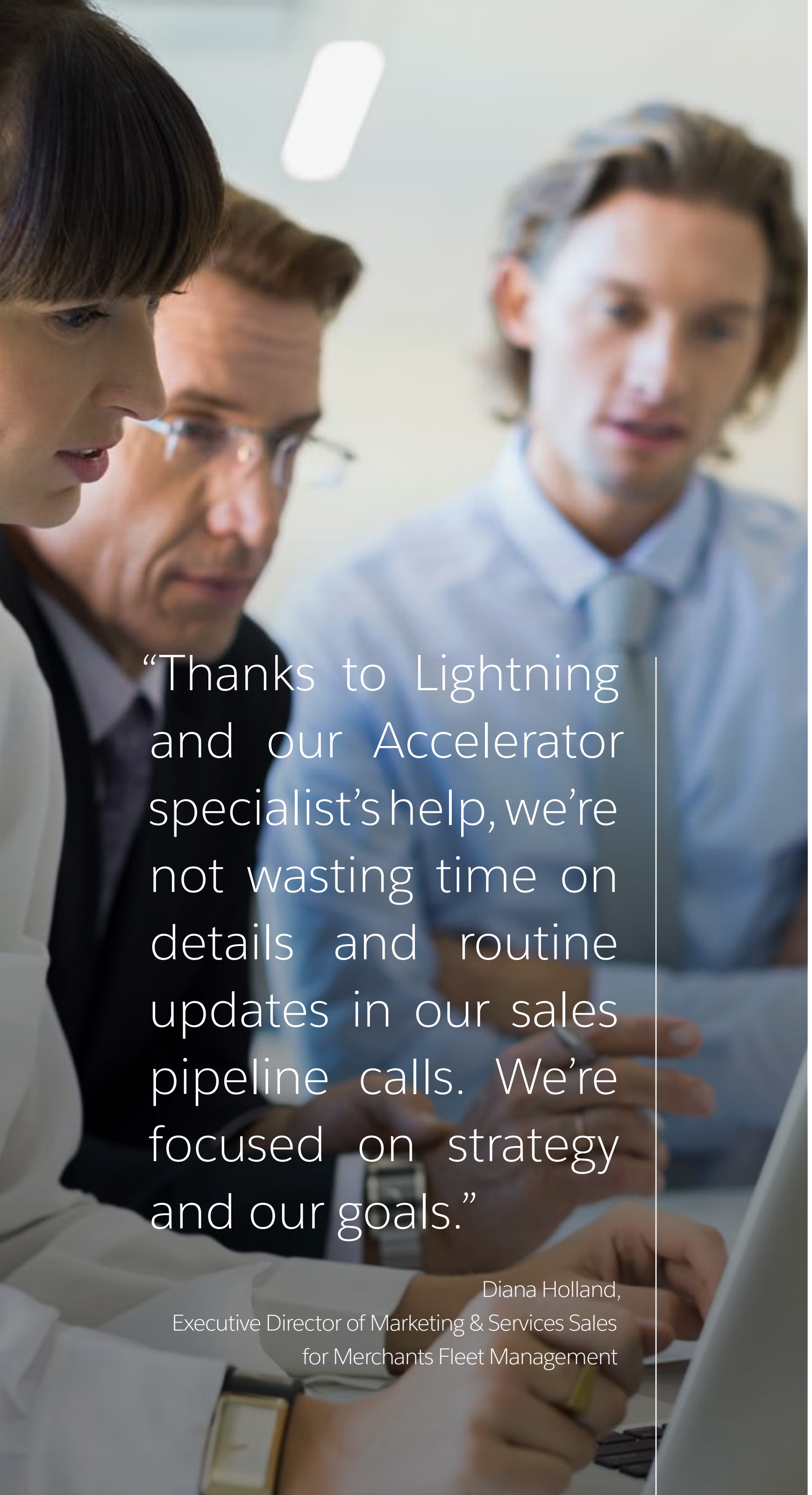
The out-of-the-box features of Sales Cloud Lightning have also made a big difference for Mitchell. Opportunity Kanban makes it easy for reps to drag and drop opportunities, and automatically recalculate totals. Sales Path provides built-in guidance to ensure consistent staging among the entire sales team.

By using Salesforce, the Mitchell team knows more about its customers and how to serve them than ever before.

"Before Salesforce, it was somewhat common to not know that the left and right hand were working on the same account," Mulvey said. "Now we have a 360-degree view of the account."

"Accelerators are a great way to kick-start something," Mulvey said. "You've got an expert there, you can ask questions, so it's just like a crash course."

Pauline Mulvey,
Vice President of Enterprise Business Technology for Mitchell



> "Thanks to Lightning and our Accelerator specialist's help, we're not wasting time on details and routine updates in our sales pipeline calls. We're focused on strategy and our goals."
>
> Diana Holland,
> Executive Director of Marketing & Services Sales
> for Merchants Fleet Management

MERCHANTS
FLEET MANAGEMENT

Merchants Fleet Management gets the right data, right away, with Lightning Accelerators.

Diana Holland and her sales team at Merchants Fleet Management had a problem. The information they needed was difficult to pull out of their legacy CRM, which made collaborating on strategy time-consuming and cumbersome.

"We had an old system where our 'next steps' were deeply buried and some people simply bypassed inputting their sales data because it was so much of a hassle," said Holland, Executive Director of Marketing & Services Sales for Merchants Fleet Management, a company that provides financing and management services for vehicle fleets.

The team was spending too much time in its weekly sales calls catching up on details instead of developing strategies.

"Our team was wasting time and getting frustrated," Holland said. "We needed a new CRM that was accurate and easy to use."

In February 2016, Merchants decided to move to Sales Cloud Lightning. Lightning had what Merchants wanted: an easy, flexible interface that surfaced data exactly where they needed it. Because Lightning was new and Holland's team wanted to get the most out of their CRM, they paired up with Suzanne Bernal-Gomez, a Salesforce Accelerator specialist. Accelerators are quick-work sessions with a Salesforce expert, focused on a specific business problem. Bernal-Gomez, who specializes in Lightning Desktop Design, helps customers quickly address issues, realize business outcomes, and boost ROI. She and Holland worked together to identify the best sales processes, then configured a custom interface and workspace to help the reps be more productive and spend less time on administrative tasks.

"Their biggest concern was how to customize their key fields sections so that reps would be able to find them and fill them out," Bernal-Gomez said.

Now, with Lightning's Contextual Hover feature, Merchants reps don't have to click through pages to view the customer information they need. Key Fields are used to capture the opportunity information most critical to the management team at every sales stage. A new Guidance for Success section guides the sales team through each sales stage to improve the accuracy of information collected. Sales managers can create next-step pipeline views tailored to their specific needs with customizable dashboards.

Throughout the Accelerator, Bernal-Gomez provided detailed training to help Merchants Fleet Management make ongoing configuration changes.

"The combination of watching the updates as they happened and having a Lightning expert on hand proved to be a real winner," said Holland. "Today, thanks to Lightning and Suzanne's help, we're not wasting time on details and routine updates in our sales pipeline calls. We're focused on strategy and our goals."

Accelerate Your Lightning Success

With the help of Accelerators, you'll have a team of Salesforce experts at your side to walk you through setup, configuration, personalization, and beyond.

Our extensive Accelerator catalog (over 150 currently available!) has something for every role, every budget, and every cloud. And we're constantly adding new ones to help you solve issues without taxing your internal teams.

Sales

Lightning Configuration Quickstart

Lightning: Art of the Possible

Lightning Desktop Design
Configure your Opportunity Workspace based on your sales process, giving reps the information they need to close deals faster, while minimizing administrative tasks and speeding up onboarding for new reps.

Lightning for Outlook and Lightning Sync Quickstart

Managing Activities in Lightning

Service

Lightning Quickstart

Lightning Console Design

Community

Lightning Community for Employees - Art of the Possible

Salesforce Partner Community Quickstart

Lightning Community Reports and Dashboards

Platform

Lightning Configuration and Customization
Get your team up to speed on screens and features, customization options, and strategies for using Lightning Components–reusable building blocks for creating pages and apps.

How to Request Accelerators

Accelerators are included with Premier and Signature Success Plans (or can be purchased a la carte with the help of your Account Executive or Success Manager.) With your Success Plan, you can access all the Accelerators you need (one at a time) in just three easy steps:

1. Go to **Help & Training** | Accelerators (a tile right on the home page.)
2. Select your Accelerator and click request.
3. A Cloud Specialist will reach out shortly to schedule your appointment.

Supercharge Your Sales Reps

With Lightning, Salesforce users can sell smarter, sell faster, and sell the way they want to sell. The result? Sales performance that blows the competition away.

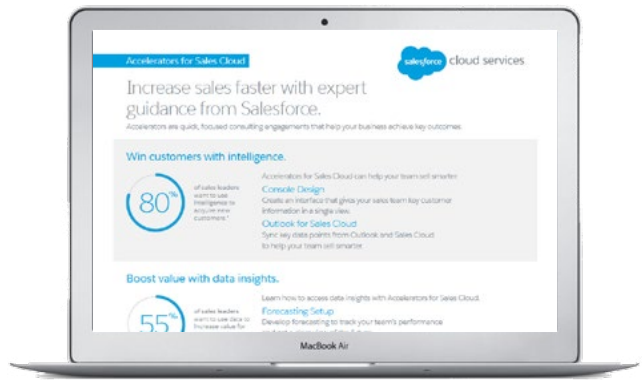
And if you're ready to move to Lightning, Salesforce Accelerators can help you get started quickly and get the most out of the new experience right away. Our Salesforce experts will help you adopt Lightning faster and show you how to customize it for your business.

To learn more about Accelerators for Lightning, visit the **Accelerator Library** or contact your Account Executive or Success Manager.

ADDITIONAL RESOURCES YOU MIGHT ALSO LIKE:

Watch the
Lightning Demo

WATCH NOW



Increase Sales Faster
with Accelerators

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CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY