ROLL OUT LIGHTNING EXPERIENCE TO YOUR COMPANY

Develop a rollout strategy to help your users get started with the new Salesforce user interface.

Table of Contents

Welcome to Your Lightning Experience Rollout

WELCOME!

Lightning Experience is a new user experience designed to help your teams work faster and smarter. With the launch of Lightning Experience, we focused on helping you deliver next level productivity with a re-envisioned desktop experience that supports your every process. The result is a more productive interface designed to support how teams work on a daily basis.

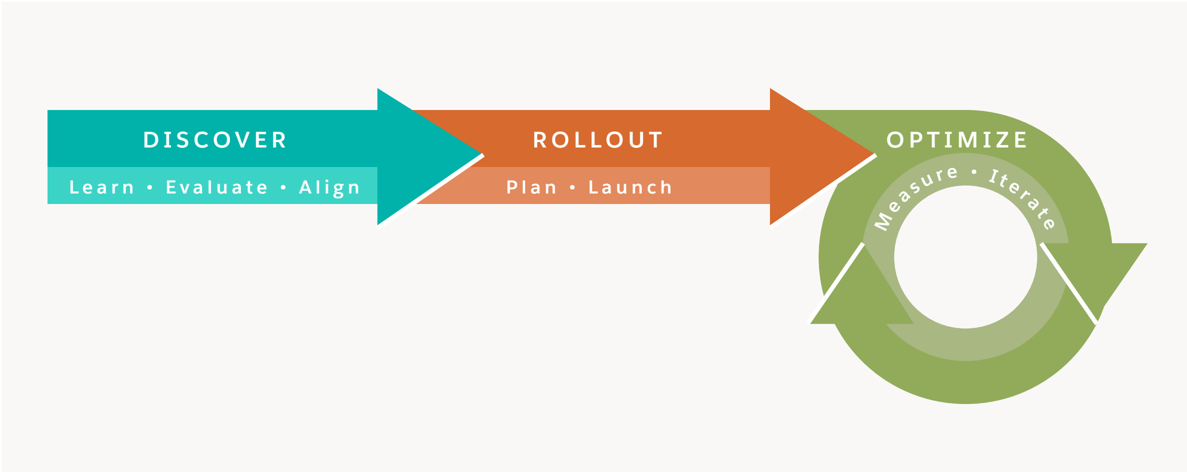
Lightning Experience is available for new and existing Salesforce customers. Whether you're a new customer, or you're an existing customer still evaluating the features and the level of effort to enable Lightning Experience for users, this e-book will help you plan your rollout strategy from start to finish. And developing a strategy is important for any project you undertake with Salesforce. Paying close attention to how your users will transition to the new experience will increase adoption and boost success.

Make no mistake, you play a critical role in this process. As a Salesforce administrator, you are more than just a builder of reports, a creator of fields, or a re-setter of passwords. You are, in fact, your company's trusted advisor for Salesforce. And when it comes to Lightning Experience, your company's rollout strategy starts with you.

Meet Astro and Friends!

As you may have noticed, the style of this e-book is inspired by the great outdoors and U.S. national parks. Why? Because they express a feeling of fun, adventure, and exploration – and Salesforce is all about empowering people to blaze their own trails and be part of something greater. Pretty cool, huh? If you want to know more, check out Trailhead, the fun way to learn about Salesforce. Get started today.

WHAT IT TAKES TO GO LIVE

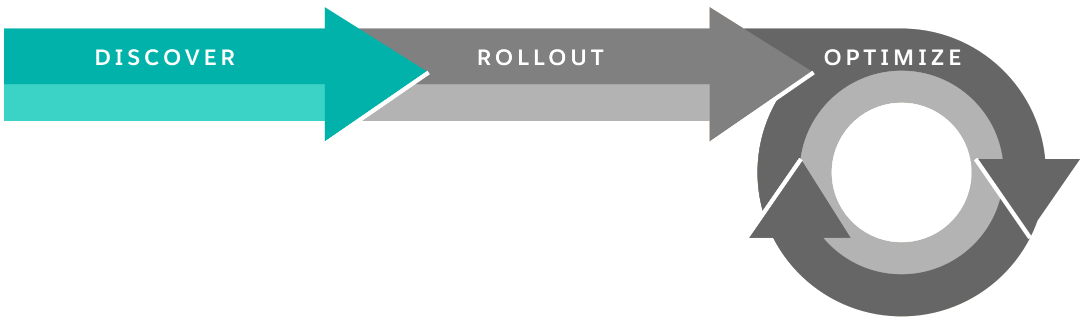


Rolling out a project is a lot like putting on a great show. You have to plan it, market it, communicate about it, and execute it. And then the reviews come in. You want rave reviews, which is why you sometimes do previews to work out the kinks before you take your show to the big stage.

As the Salesforce admin, you're the Director of the show. You make it awesome. For the show we're organizing right now ("Lightning Experience Rollout: The Musical," anyone?), you'll find an executive sponsor and get stakeholders aligned on the value of switching to Lightning Experience, then you'll plan your rollout. You'll decide whether to start with a pilot for a set of users (like a preview) or go big and enable for all users at once (head straight to Broadway). And then you'll put on the show.

Depending on the size of your organization, you might have a Project Manager assigned to the rollout, or you may be working with a Change Management department at your company. Or you could be charged with organizing and executing the rollout from start to finish. Regardless, your role in getting Lightning Experience live is critical, and it starts with learning everything you can about the new interface. Let's begin there.

Educate Yourself and Your Company on Lightning Experience



EDUCATE YOURSELF ABOUT LIGHTNING EXPERIENCE

Before you start defining your strategy to roll out Lightning Experience, spend some time learning about the ins and outs of the new interface. Trailhead is great place to do that. We recommend these modules to get you started:

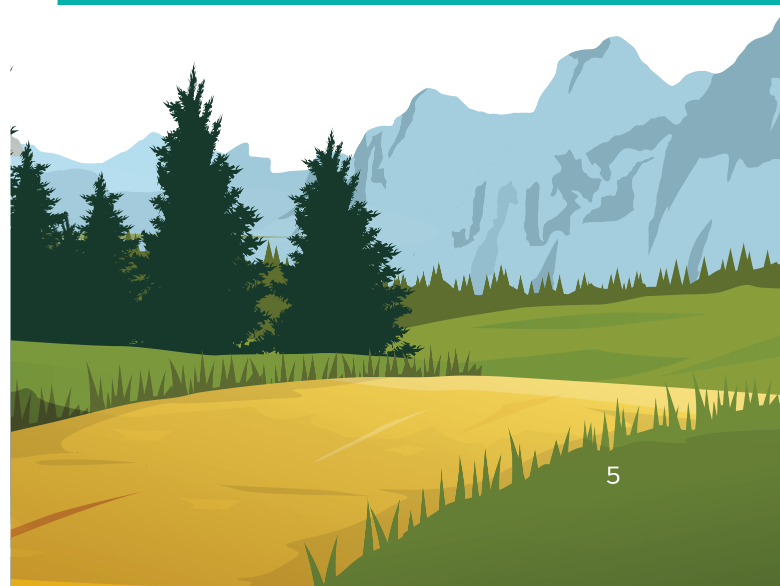
Lightning Experience Basics

Lightning Experience Features

App Customization Lite

Discover

- *Learn about Lightning Experience*
- *Identify stakeholders and executive sponsor*
- *Educate your company*
- *Review feature comparison charts*
- *Conduct a gap analysis (existing customers)*



IDENTIFY STAKEHOLDERS AND AN EXECUTIVE SPONSOR

It takes a team to roll out any Salesforce project, and there's no better time to involve your team than right at the beginning. Identify key stakeholders at your company from across all affected departments and form a steering committee, helmed by an executive sponsor who is invested in Salesforce.

This step is critical. Whether you've already committed to rolling out Lightning Experience or you're still evaluating features, you need executive support to ensure you've got resources and alignment to succeed. In addition, you need the right people from across the company to join your project team, to ensure that every department has their needs met.

As you form your project team, keep in mind that depending on the size of your company, you might have people who fill multiple roles (or "wear multiple hats").

When you've identified an executive sponsor and your stakeholders, involve them in your project early and often, sharing everything you've learned about Lightning Experience with them.

With your new project team, and a clear understanding of the benefits you'll get from Lightning Experience, you're ready to evaluate your business and technical readiness for Lightning Experience. What are the opportunities to streamline your current business process by harnessing Lightning Experience features? How well will your org's features and customizations work as-is in the new interface? How much work is actually required before you can make the switch? Time to find out!

Executive Sponsor

Sales Manager

Sales Operations

Salesforce Admin

Super User

REVISIT YOUR PROCESSES

As you and your stakeholders explore the features and benefits of Lightning Experience, there will likely be questions that sound like this: "That's cool, but can it do this thing we do today? What about that other thing we do–can it do that?"

It's natural to be thinking about how you can take your existing business process and make it work in the new user experience. But sometimes revisiting a process and improving it is a better next step. In other words, maybe "the way we've always done it" isn't always the best path forward. More than just a new interface, Lightning Experience frees you to re-imagine how you manage your business. As trusted advisor, you can help your users see that updating their process to adopt new features and paradigms in Lightning Experience can actually make them more productive.

And if you've been a Salesforce customer for a long time, no doubt your business has evolved and changed. This is a great opportunity to re-evaluate what your users need and align your Lightning Experience implementation with those needs.

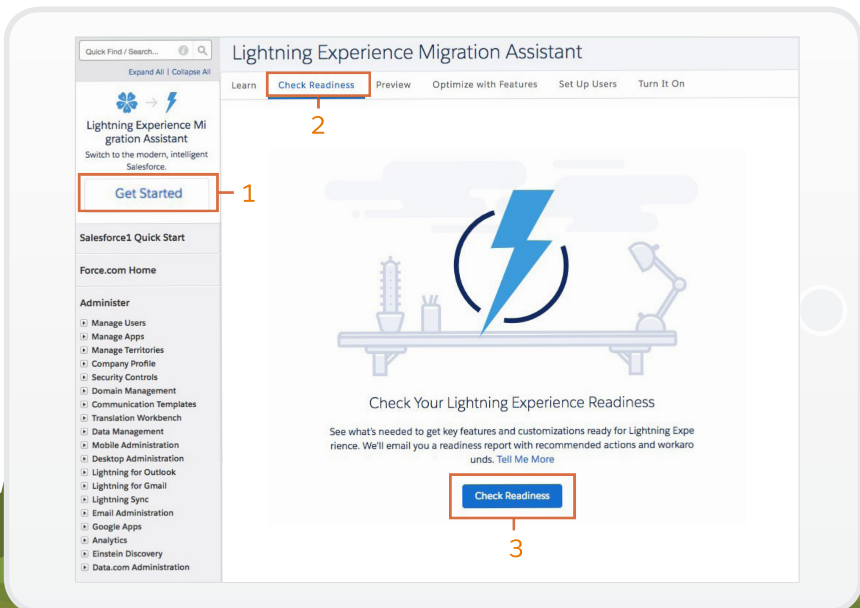
So how do you do that? It's easier said than done, but here are some ideas:

- Ask directly, "Can we change the way we do it?" The value proposition of new, improved functionality might be worth updating an existing process.
- Walk key members of your sales teams and super users through Lightning Experience features, showing them how easy they are, how they work, and why they're helpful.
- Above all, work with your executive sponsor to drive the right behaviors from the top down.

PERFORM A GAP ANALYSIS

Performing a gap analysis is where you get into the nitty gritty details of how your current Salesforce implementation will work when you move to Lightning Experience. Of all the steps for your rollout, this one is probably the most critical because it'll help you know what changes or workarounds you might need to put in place. You may even be delighted to learn that you're ready for Lightning Experience now!

Luckily, we have the perfect tool to make light work of this analysis. Meet the Lightning Experience Readiness Check!



Access the Readiness Check from the Lightning Experience Migration Assistant.

From Setup in Salesforce Classic:

1. Click **Get Started** in the Migration Assistant tile at the top of the menu.
2. Select the **Check Readiness** tab in the Migration Assistant.
3. Click **Check Readiness.**

After you kick off the Readiness Check, Salesforce generates a PDF Readiness Report and emails it to you. Salesforce also saves the report to Salesforce Files.

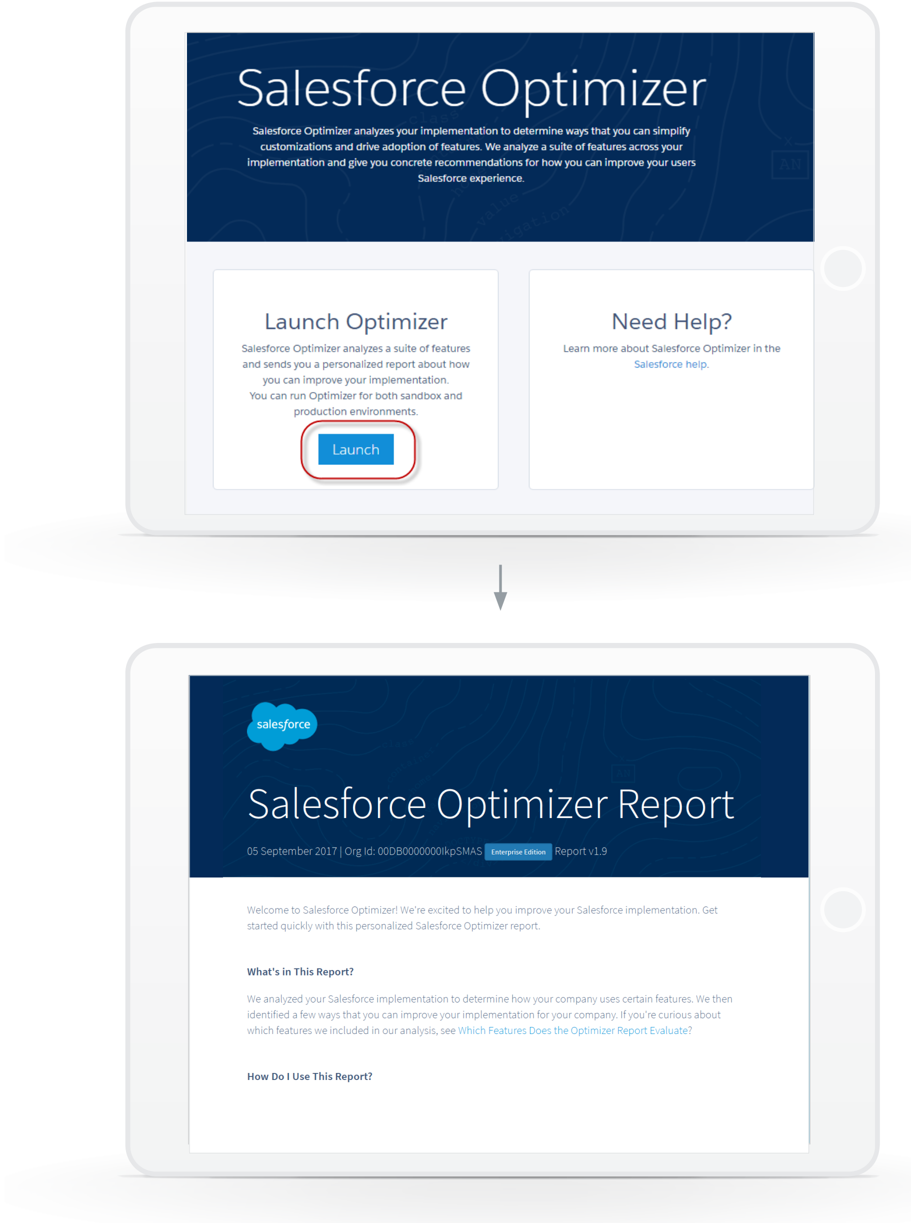
IMPROVE YOUR IMPLEMENTATION WITH SALESFORCE OPTIMIZER

Salesforce Optimizer is a great resource for identifying things you can simplify or leave behind when transitioning to Lightning Experience. Optimizer generates a report that's specific to your implementation, uploads it as a file, and emails it as an attachment to the admin who runs the report. The report provides recommendations to improve feature use, clean up customizations, and reduce complexity.

Some of the features that Optimizer evaluates include Apex triggers, fields, profiles, record types, and validation rules. For the complete skinny, take a look at [Which Features Does Optimizer Evaluate?] in the Salesforce Help.

To start optimizing, from Setup, enter Optimizer in the Quick Find box, then select **Optimizer**. Click **Launch | Allow**.

Depending on the size of your implementation, the Optimizer report takes from a few minutes to several hours to run. When it's ready, you get a copy in email and a copy is saved to Salesforce Files.



GET HANDS-ON WITH LIGHTNING EXPERIENCE

One of the best ways to evaluate how your org's features and customizations work in Lightning Experience is to get some hands-on experience in the new interface. If you'd like to try out Lightning Experience before you enable it in your production org, you've got options.

Option 1

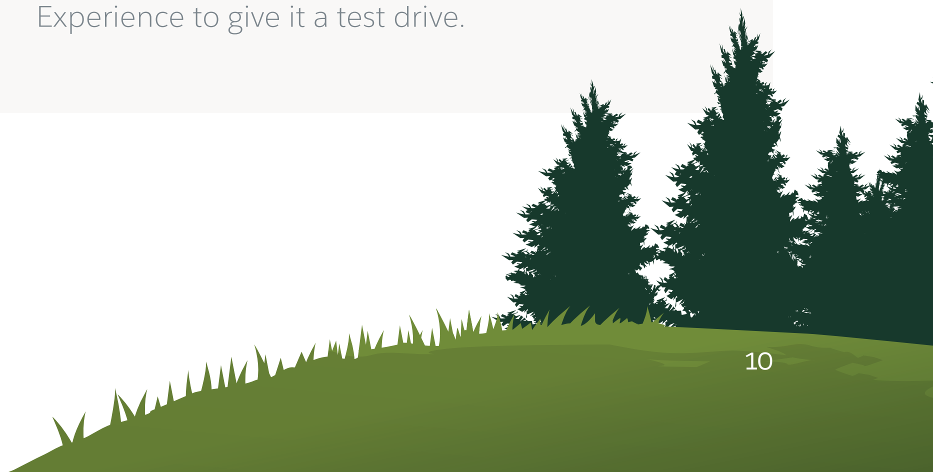
Use the Preview tool that's available from the Lightning Experience Migration Assistant. Preview lets you explore your production org in Lightning Experience without actually enabling the new interface. You can see exactly how your real data and your current customizations work. You can even change data, settings, permissions–you name it. But remember that because you're working in your live org, changes you make are for real and can impact your users back in Salesforce Classic.

Option 2

If you have a sandbox, that's the ideal place to enable the new interface and play around with settings and customizations in earnest. For steps to enable Lightning Experience, see How to Enable Lightning Experience.

Option 3

Don't have a sandbox? Get a free Developer Edition or Admin Playground and enable Lightning Experience to give it a test drive.



EDUCATE YOUR COMPANY ABOUT LIGHTNING EXPERIENCE

When you're finishing assessing the impact of each gap, you're ready to present your findings to the entire steering committee and your executive sponsor. This meeting is where you showcase all the benefits of Lightning Experience, and highlight the gaps you've found. Come prepared to advise when you think your company should move to Lightning Experience, the amount of time and resources required for the move, and your proposed launch date.

> One of the most important questions your executive sponsor and stakeholders will have is, "How will Lightning Experience help my team sell more?"

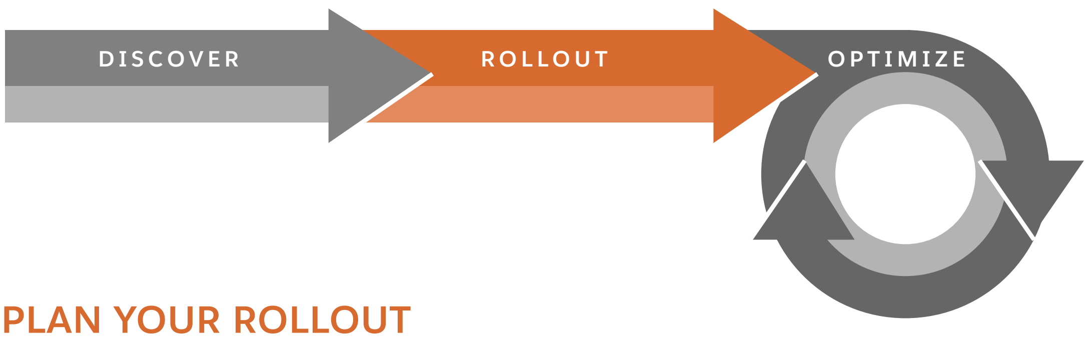
One of the most important questions your executive sponsor and stakeholders will have is, "How will Lightning Experience help my team sell more?" So start your presentation by showcasing the benefits of Lightning Experience. To help you share Lightning Experience with your company, get the presentation deck in this enablement pack, which highlights features and benefits.

If you're an existing Salesforce customer, explain if any features that are important to your company aren't available in Lightning Experience today. Your stakeholders can use this information to make an educated decision on when to enable the new interface for your different groups of users.

In addition to sharing the presentation, consider providing a demonstration for your team.

CHAPTER 2

Craft and Execute Your Rollout Strategy



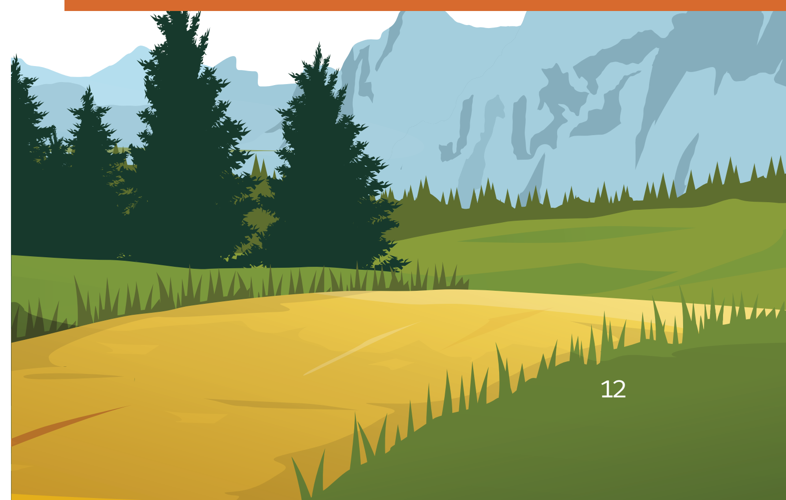
PLAN YOUR ROLLOUT

There are several tasks to consider when rolling out Lightning Experience. Depending on your company, you don't have to do all of them, but consider them regardless. Check the enablement pack for a sample Lightning Experience rollout checklist.

Your rollout will likely be organized into these main phases. You already learned about the "Discover" steps in the last chapter. Now we'll dive into the "Roll Out" phase.

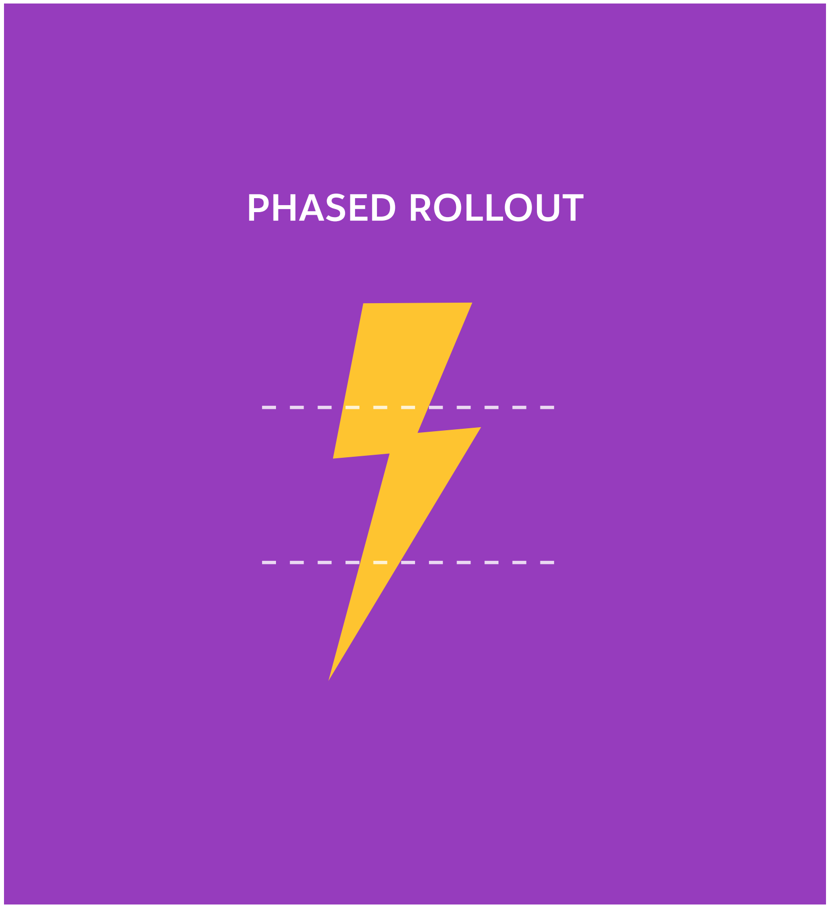
Roll Out

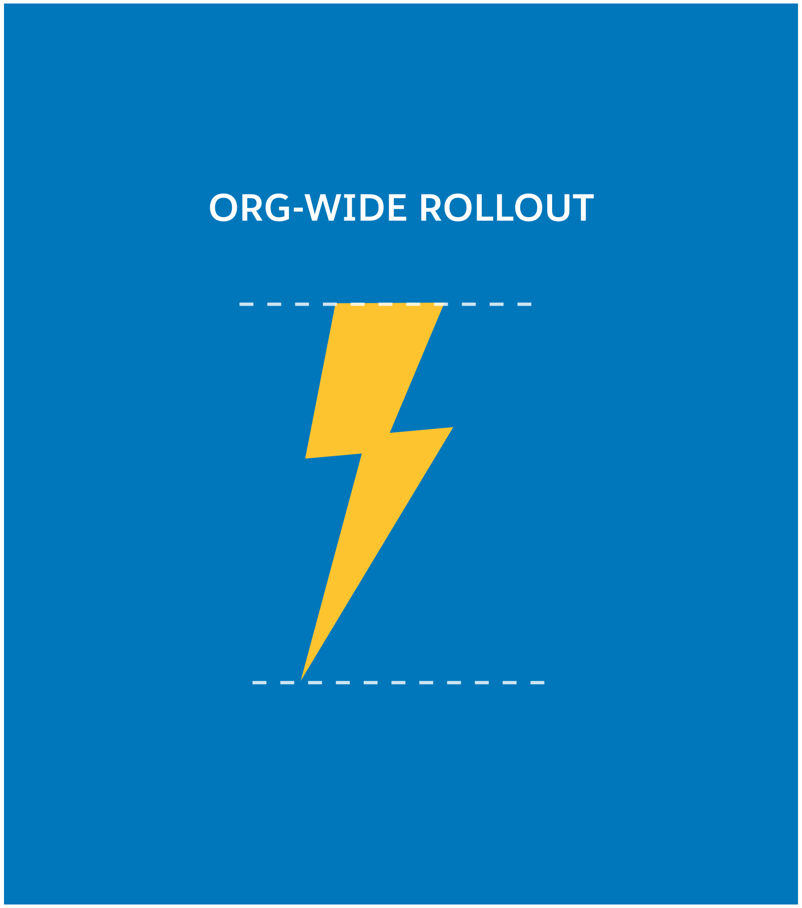
- → *Identify users for a pilot (optional).*
- → *Identify and activate super users.*
- → *Create a project schedule.*
- → *Define measures for success.*
- → *Create and execute marketing and training strategies.*
- → *Customize and test.*
- → *Go live!*



DECIDE HOW TO STRUCTURE YOUR ROLLOUT

There isn't a single right way to roll out Lightning Experience. There are several variables to consider when deciding on a strategy–like the complexity of your implementation and the size of your Salesforce user base. But in most cases, you'll take one of these approaches: transition your org gradually in phases or go all-in, switching your entire org at the same time.





To pick the best strategy for your org, let's look at the benefits and considerations for both approaches.

PHASED ROLLOUT

Unless your org is small, it can be advantageous to transition your users to Lightning Experience over the course of several phases.

This approach allows you to tackle your business and technical requirements incrementally, and iterate on lessons learned.

For each phase, pick teams or groups of users whose business needs are met by the current state of your Lightning Experience implementation.

After launching a phase, collect feedback. Then fine-tune things and kick off the next phase.

Note: If you're using Group Edition, this approach isn't an option for you. Lightning Experience is "all or nothing"– all users get access when Lightning Experience is enabled.

VS

ORG-WIDE ROLLOUT

With this approach, you enable Lightning Experience for all users in your org at the same time.

On the surface, this may seem like the easiest, most straightforward way to structure your rollout. If your org configuration is simple and you don't have many Salesforce users, this method may make the most sense for you.

But this method requires that you're highly confident that everyone gets what they need in the new interface and that everyone is prepared for the transition.

The need for advanced preparation has implications for how long it will take to get ready to flip the switch.

BENEFITS OF A PHASED ROLLOUT

Run a pilot to learn about and refine your implementation

Ensure that users are productive and enthusiastic about adopting Lightning Experience by starting small with a pilot program. Using the first phase to conduct user acceptance testing allows you to gather feedback from pilot users and solidify your implementation before going all-in with the next phase.

Break up the work and avoid technical debt

For each phase, focus your configuration and development efforts on just what's necessary to make the users in that phase productive. Chunking up the work allows you to make continual progress on your implementation and avoid the pitfalls of falling behind on new features and enhancements as they're released.

Get fine-grained control over which users get access to Lightning Experience

Use permission sets for a flexible way to roll out Lightning Experience to a particular team or group of users. Rather than updating your custom profiles, create a permission set that includes the Lightning Experience User permission, then assign the permission set to the users you've identified for each phase.

VS

BENEFITS OF AN ORG-WIDE ROLLOUT

Simpler training and change management landscape

With all your users moving to Lightning Experience at the same time, you can run a single campaign to get everyone on board. And you only need to maintain training materials for one interface.

Simplified feature and program enablement

You don't need to evaluate new features, customization work, integrations, or partner applications for multiple interfaces. All your users get the benefits of new features and technology as they're released.

CONSIDERATIONS FOR A PHASED ROLLOUT

Keep teams together

Put people who work closely together in the same phase. You want people who work together seeing the same screens. If people collaborate often, they should have the same user experience, including team leaders.

If you have standard profile users who shouldn't get access to Lightning Experience in earlier phases, plan to move them to custom profiles that don't include the Lightning Experience User permission.

Be mindful of gaps

If you have teams that are heavily impacted by issues that you identified in your gap analysis, avoid including those teams in a phase until the issues are addressed. Even if the number of gaps is small, if the impact is large, consider carefully if they'll be productive working in Lightning Experience.

More training and other change management is required

You'll need to invest more time in change management activities. For example, you'll need to repeat communication and drip campaigns for each phase. And depending on how far apart you launch each phase, you may also need to run user trainings multiple times.

VS

CONSIDERATIONS FOR AN ORG-WIDE ROLLOUT

Delays time to launch

Getting Lightning Experience ready for everyone in your org means you're front-loading all the preparation work, including implementing all required business processes and addressing all technical issues and feature gaps that you identified. In other words, it can be quite time consuming to get ready for this approach.

Less feedback increases the chance of missing something important

Waiting to go all-in with everyone means that you don't get the advantage of early feedback on how things are working. If you inadvertently miss an important use case or customization, everyone is impacted instead of a smaller subset of users. If users don't get what they need out of the gate, they lose their enthusiasm. Ultimately, adoption rates could suffer.

Watch out for technical debt

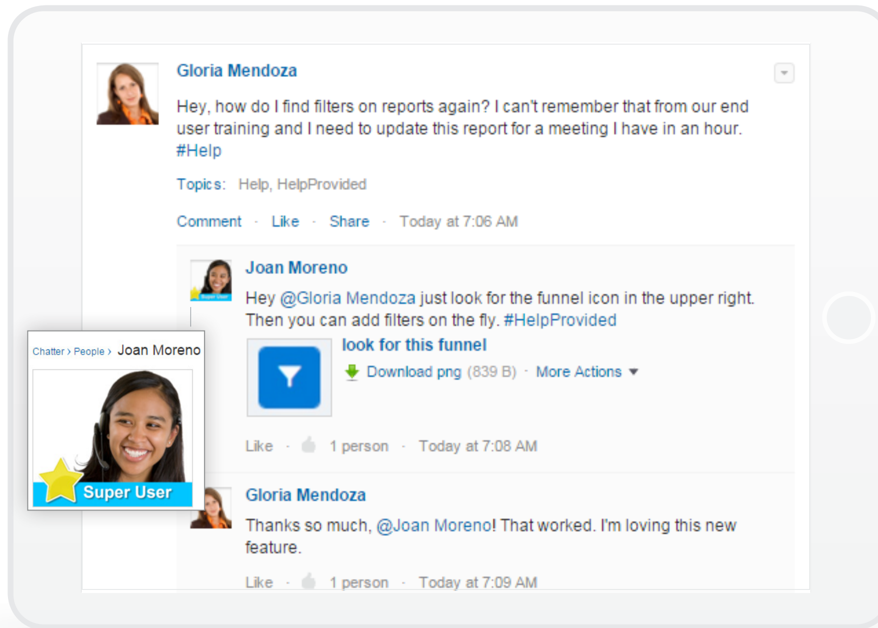
We're continually improving and enhancing Lightning Experience. The longer it takes to move your org over, the more features and opportunities for improved productivity you'll get behind on.

UNLEASH THE POWER OF SUPER USERS

Super users are employees who understand the vision and value of your implementation, want to help you optimize and improve what's in place, and are passionate about helping others adopt Salesforce. Often closely engaged with your employee community, super users know how well systems and processes are being adopted, and which pain points are preventing adoption. Super users are also the first people your employees go to for help, and they can be incredible in helping you answer questions and provide support.

Super users are often natural leaders, well-respected by their peers, and can be your evangelists in the field. And when it comes to rolling out Lightning Experience, they can help make your project a success.

Work with your Executive Sponsor and stakeholders to identify a group of super users. Involve your super users in the rollout by giving them sneak peeks at Lightning Experience and early opportunities to train on the new technology. Seek their feedback on your marketing and communication plans, and consider asking them to train users, with a train-the-trainer approach.



Officially recognize their super user status through a special designation, like a custom icon on their Chatter profile photo, a button, a t-shirt–or all three! Make them moderators or managers of public Chatter groups for Lightning Experience. All of this helps validate their role as leaders in your employee community and empowers them to help others.

PICK A LAUNCH DATE

Pick your launch date wisely! Think about aligning your launch to coincide with your company's sales kickoff meeting or another large company event where you can get organic exposure for your rollout. Avoid holidays and confirm stakeholder availability in advance. If a key stakeholder is on vacation for three weeks leading up to your launch date, consider revisiting your selected date!

> Think about aligning your launch to coincide with your company's sales kickoff meeting or another large company event...

Take this opportunity to review your existing Salesforce roadmap and clear any projects that might compete with your rollout. Work with your executive sponsor to clear any roadblocks, such as competing non-Salesforce projects that require resources you need for your rollout. If your rollout looks complex, you may need to advise your company to put other projects on hold until this project is complete.

Could Be Good Timing

- [x] Sales kickoff
- [x] Company meeting
- [x] Low season (if applicable)

Not So Much

- ☒ Holidays
- ☒ End of quarter / fiscal year
- ☒ When key stakeholders are on vacation

CREATE A PROJECT SCHEDULE

There are apps on the AppExchange or software programs designed to help you manage all the milestones and tasks associated with your project. You may already have a favorite program or app that you like to use.

In any project, you need to be flexible either on the go-live date, the scope, or the resources allocated. Here's the first part of a sample project schedule with a fixed go-live date and scope, for a company with a straightforward migration path and a small group of users.

Check out the enablement pack for the full sample schedule. In this example, the time to go live is one month from the start date, with a launch date of October 15. There are two weeks of post-launch activities following the launch before the project officially closes, at which point you move into maintaining and iterating on the solution provided.

One of the key items in phase three of the schedule is to identify measures for success. This is how you'll ultimately know if your project was successful, based on the criteria you define for what success looks like. Let's talk about that next.

Example Project Schedule

#	TASK NAME	OWNER	STATUS	DEPENDENCIES	DURATION	START	END
1.0	Educate yourself	John	Complete	N/A	1 day	9/5	9/6
1.1	Complete Trailhead modules	John	Complete	N/A	1 day	9/5	9/6
1.2	Sign up for Developer Edition organization	John	Complete	N/A	1 day	9/5	9/6
1.3	Read the Lightning Experience Guide	John	Complete	N/A	2 days	9/6	9/8
1.4	Review comparison charts	John	Complete	N/A	1 day	9/6	9/7

DEFINE MEASURES FOR SUCCESS

Work with your executive sponsor and stakeholders to determine how you want to measure success. Document current pain points and look for ways to measure improvements in these areas. For example, you could look for productivity gains, data quality gains, or financial goals.

You could also measure success based on employee or customer sentiment, using a survey app from the AppExchange to collect feedback, or simple Chatter polls to survey employees quickly.

In each instance, conduct a baseline survey or take an analytic snapshot to measure any increase or decrease following your go-live.

We'll discuss methods for measuring success in the next unit. At this stage, work with your project team to outline the specific measures you want to monitor.

Metrics for Measuring Success

- Reduction in opportunities with no folow-up tasks
- Increase in calls logged
- Increase in lead conversion rate

CREATE A MARKETING AND COMMUNICATION STRATEGY

This is the part of the rollout where you can inject some fun into the project, and where you can go live with greatness. Consider making your go-live into a true event and use simple marketing strategies to build buzz and excitement about the coming launch for weeks in advance.

> Consider making your go-live into a true event and use simple marketing strategies to build buzz and excitement...

No matter your budget, you can use your creativity to market your go-live. Don't forget to ask for help from internal teams, including customer care, training, and support teams.

Launch ideas include:

- Send a weekly email drip campaign highlighting the coming launch and a "feature of the week" (enablement pack).
- Create a topic in Chatter for all your communication updates to drive momentum and buzz.
- Have a raffle with prizes, such as gift cards, a free day off, or lunch with an executive.
- Host a launch party with cupcakes or cake.
- Order swag and branded items to distribute on the day of your go-live.

CREATE A TRAINING PLAN

As part of your rollout, prepare your users for the changes in the new user experience. First, direct your users to Trailhead! We've put together two learning experiences for them to use.

Salesforce User Tour

Sell Lightning Fast with Salesforce

Depending on how customized your user interface is or how complex your processes are, you may also want to conduct your own end user training. Here are some important options and questions to consider when developing and executing a training plan.

ENABLEMENT METHOD	CONSIDERATIONS FOR EACH METHOD
Training Model	Train-the-trainer, Super User, In-Person, Virtual, or a Combination
Training goals	What is the specific outcome you want to achieve with this training?
Trainer	Who will conduct the training?
Trainees	Who needs to be trained?
Training methods	What will you use to conduct the training? What materials need to be developed?
Training location	Will you train remotely or in-person?
Training metrics	How will you determine if the training was successful?
Continue Education	Office hours, Chatter groups, Lunch and Learns, Team Meetings,

TEST YOUR CUSTOMIZATIONS AND ITERATE

For existing customers, if you already have customizations in place, we recommend enabling Lightning Experience in a sandbox and testing their behavior. For unsupported features, like JavaScript buttons, analyze what the underlying function is of each. Here's a set of questions you can use in your analysis:

- **What does the customized feature do?**
- **What objects are affected or accessed?**
- **What are the resulting actions of using the customized feature?**
- **What is the user experience?**
- **Where can your user access the customized feature?**

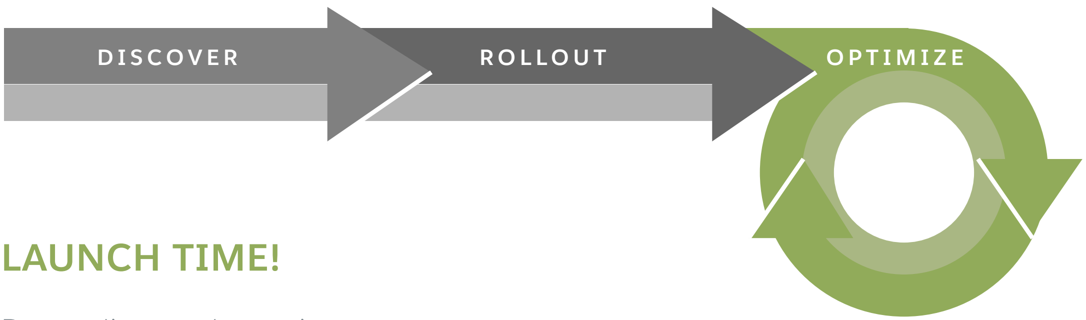
After you have the answers to these questions, you can start to map the customized feature to a possible replacement.

IF THE CUSTOMIZED FEATURE DOES THIS:	CONSIDER USING THIS INSTEAD:
Creates a related record	Process Builder
Updates an existing record	Actions
Creates related records and updates existing records, with complex logic	Process Builder and Visual Workflow
Launches a screen for user input	Visual Workflow
Sends an email or creates a task	Process Builder
Launches a time-triggered process	Workflow Rules

As you work through updating these processes, work closely with your super users and users to test the replacement solutions you build. Create test plans and conduct User Acceptance Testing (UAT) to ensure features work as expected. Get a sample test plan document in the enablement pack.

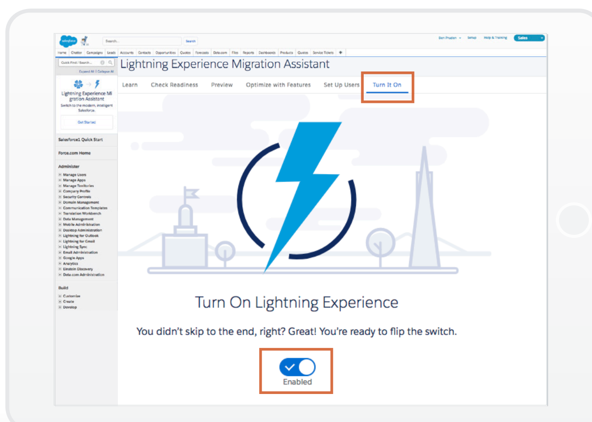
CHAPTER 3

Go Live with Lightning Experience



LAUNCH TIME!

Depending on the project, the go-live step can be simple, complex, or somewhere in between. We make it easier with the Lightning Experience Migration Assistant, where you can access all the steps that need to be completed to move to Lightning Experience. Access this page from Setup in Salesforce Classic, by clicking **Get Started** in the Migration Assistant tile.



Optimize

- Evaluate current post-launch state
- Survey business users
- Use reports and dashboard to track metrics and feedback
- Deliver summary to executive sponsor

DRIVE ADOPTION BY OPTIMIZING YOUR IMPLEMENTATION

Whether you initially go live with a pilot group or you enable your entire org at once, you want to make sure that your users stay enthusiastic and committed to working in Lightning Experience. This is the time to rinse and repeat. Or rather, optimize your rollout by measuring how things are going and iterating on all the good work you've done so far.

> Optimize your rollout by measuring how things are going and iterating on all the good work you've done so far.

With this data in hand, you'll have a solid idea of what your next steps should be. You'll know which new use cases are priorities for fine-tuning your implementation, which features on the Lightning Experience roadmap are important, and when you'll be ready to add another round of users to Lightning Experience.

Monitor Success Metrics

Monitor how your success metrics are looking. For example, collect feedback on how users are liking the new experience. And measure for things like:

- **Productivity Gains**
- **Business Success**
- **Adoption Rates**–including how many users are switching back to Salesforce Classic and why.

ENGAGE WITH SUPER USERS

Your super users are key to the success of your rollout. Leading up to your go-live, engage with your super users often. Depending on your training approach, you might be partnering with them as they lead user training in the field.

On the day of your go-live, super users play an essential role. Even with the most successful projects, your users are going to have questions. Those questions can come in the form of in-person conversations or questions asked on Chatter. Your super users can help you swarm on those questions, and escalate any bugs or critical issues that are discovered.

> Even with the most successful projects, your users are going to have questions.

Post-launch, keep the conversation going. Your super users' expertise is invaluable as you work on optimizing Lightning Experience.

Value of the Super User

- Play the role of Salesforce evangelist in the field
- Swarm on questions from users, in-person and on Chatter
- Help you boost adoption
- Train users
- Share valuable insight from the field
- Report bugs and issues
- Weigh in on the roadmap
- Test new features before they go live
- Provide feedback in forums, meetings, and focus groups

MEASURE RESULTS

When you were planning your rollout strategy, you worked with your executive sponsor and stakeholders to determine your success metrics. Those metrics might have included things like:

Metrics for Measuring Success

- **Reduction in opportunities with no folow-up tasks**
- **Increase in calls logged**
- **Increase in lead conversion rate**

Or, the metrics might have been based on employee or customer satisfaction, or even a mixture of both. For either approach, you need a baseline to work from to track changes in the numbers, so don't forget to take a snapshot or conduct a survey before you go live.

Let's discuss each approach in detail.

SURVEY YOUR USERS

You can use several methods to survey your employees and customers.

Survey

Use a survey app to conduct a formal written survey, measuring overall satisfaction and any pain points.

Focus Groups

Bring together a group of customers or employees and ask a set of specific questions.

Poll

Create an informal Chatter poll to gather quick insights. Users can also provide written feedback in the poll's comment thread.

Not sure what to ask? Here are some ideas. We're including questions that are open-ended and appropriate for focus groups, forums, and shadowing, and also questions more appropriate for a written survey:

Open-ended questions

- How do you use Salesforce?
- What do you like best about Salesforce?
- What would you change about Salesforce?
- What is most frustrating about Salesforce?
- What information do you need that you can't find?

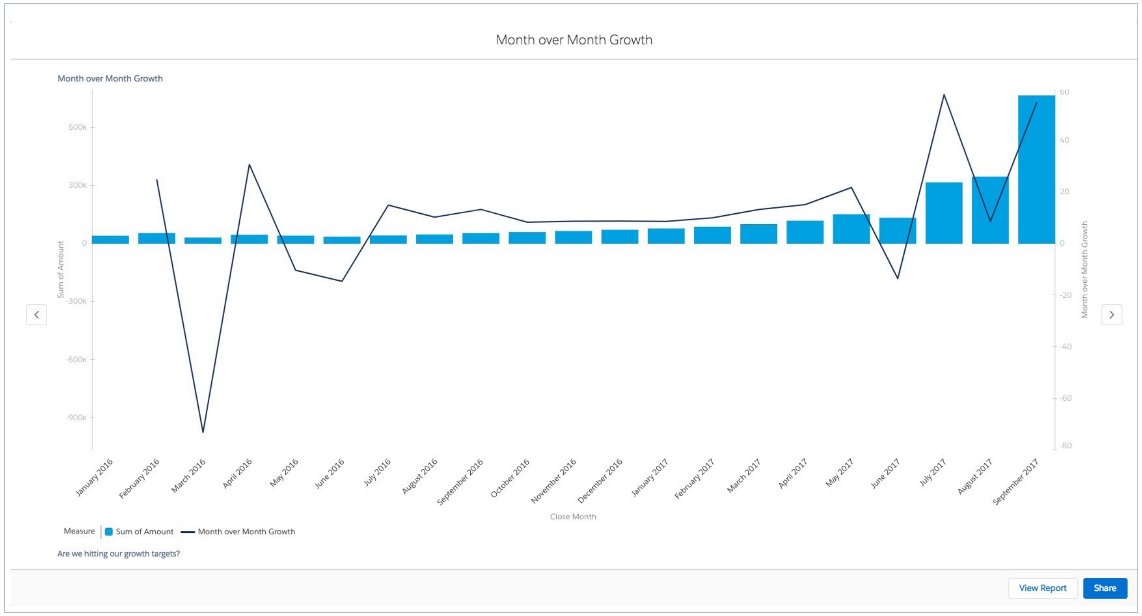
Survey questions

- How long have you been using Salesforce?
- Rate your overall productivity using Salesforce.
- Rate your overall satisfaction with Salesforce.
- I have the tools I need to do my job: Yes or No.
- It's easy to work in Salesforce: Yes or No.

When you're receiving feedback, it's important that your users feel heard, even though you can't address all feedback. Consider starting a "You Asked, We Listened" program where you address some employee feedback items every quarter.

USE REPORTS AND DASHBOARDS IN SALESFORCE

If you've decided to use Salesforce metrics for your success measures, then you can create reports and dashboards within Salesforce to track those metrics. For example, this dashboard component shows closed deals, month over month:



Reporting Snapshots are a way to analyze trends over time, right in Salesforce. Check out Prepare Reporting Snapshots in the Salesforce Help to learn more.

TAKE PRODUCTIVITY TO THE NEXT LEVEL

You now have the tools and best practices you need to successfully roll out Lightning Experience. Whether you're piloting with a group of users or rolling out to your entire company at once, this is your chance to go big...and break through to the next level of productivity. Good luck!

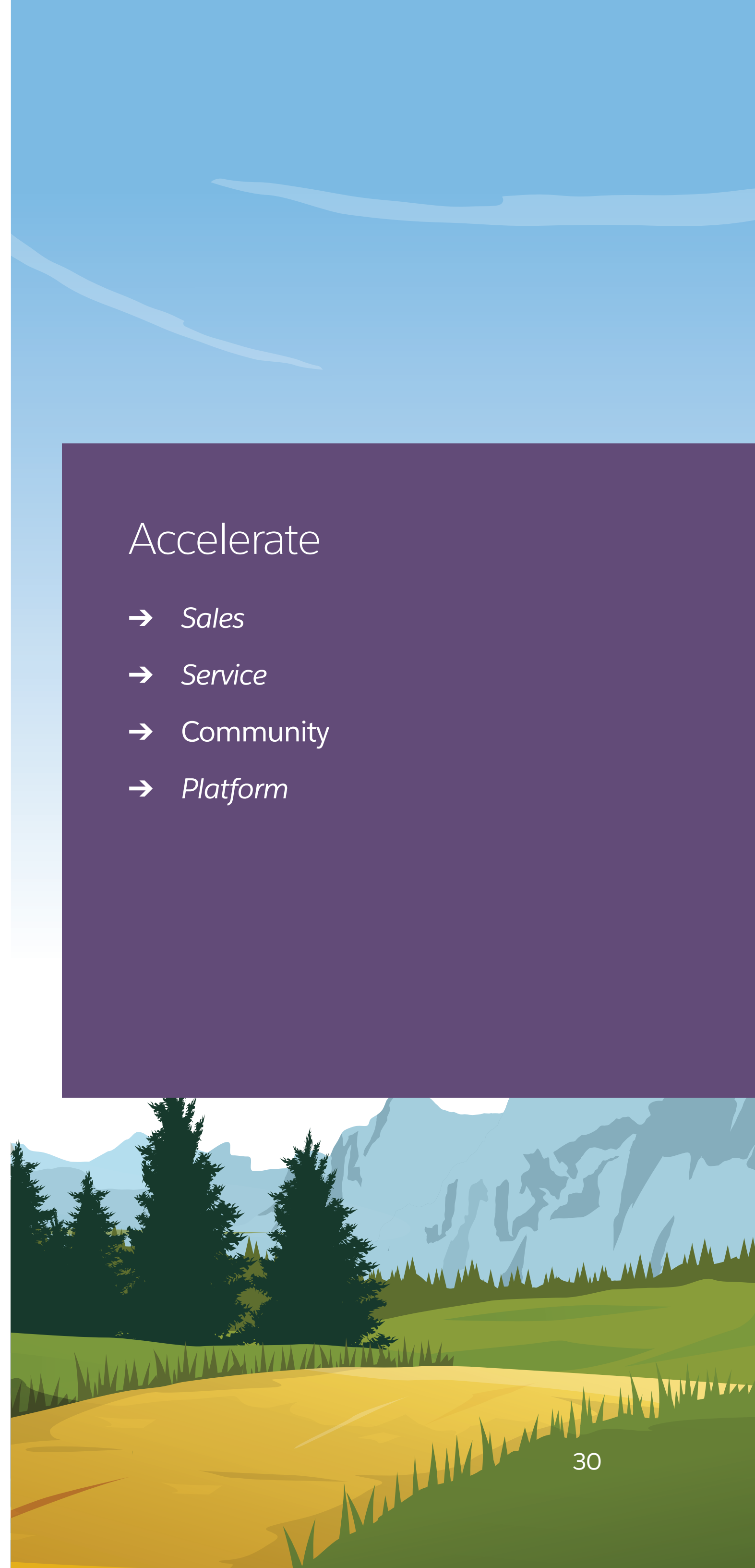
CHAPTER 4

Resources to Accelerate Your Lightning Experience Success

HOW CAN YOU SEE SUCCESS WITH LIGHTNING EXPERIENCE EVEN FASTER?

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.

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. 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.



Accelerate

- → *Sales*
- → *Service*
- → Community
- → *Platform*

ACCELERATORS CURRENTLY AVAILABLE FOR LIGHTNING EXPERIENCE

SALES

Lightning Configuration Quickstart

Lightning: Art of the Possible

Lightning Desktop Design

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

HOW TO REQUEST ACCELERATORS

Accelerators are included with Premier and Signature Success Plans. With your Success Plan, you can access all the Accelerators you need (one at a time) in just three easy steps:

Step 1

Go to Help & Training | Accelerators (a tile right on the home page).

Step 2

Select Your Accelerator and click Request.

Step 3

A Cloud Specialist will reach out shortly to schedule your appointment.

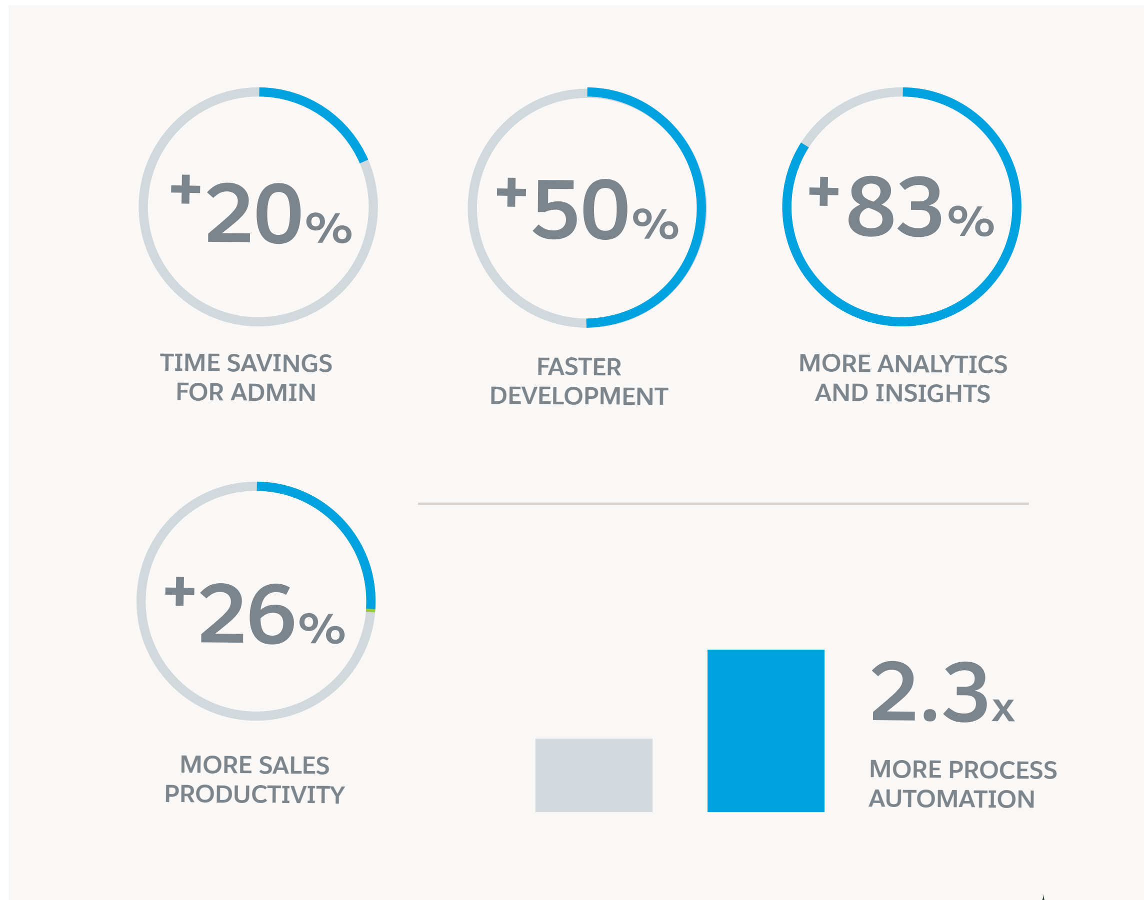
SALESFORCE SUCCESS PLANS - BLAZE YOUR PATH TO SUCCESS, FASTER

Even beyond Accelerators, Premier and Signature Success Plans come with tools and resources to help you get the most out of Lightning and your entire Salesforce experience.

For example:

- Configuration Services - hand off repetitive, time-consuming tasks to us
- Developer Support - let us review and troubleshoot code you built
- 24/7 Support and fast response times - get help when and where you need it

In fact, customers with Success plans have seen results that impact their entire business.



To learn more about Success Plans and which might be right for your business - or how you can get more out of your existing Success Plan - visit the [Success Pans overview webpage](). Or contact your Account Executive or Success Manager.

	Standard	Premier	Signature
Guided Journeys	●	●	●
Success Community	●	●	●
Trailhead	●	●	●
Circles of Success		●	●
Interactive Webinars		●	●
Success Management		●	●
Developer Support		200 lines	5000 lines
Configuration Services		optional	●
Productivity Services		optional	●
Accelerators			●
Salesforce Release Planning			●
Architecture Assessments			●
Designated Expert Resources			●
Support	**12/5 Online 2-Day Response**	**24/7 Phone & Online 1-Hour Critical Response**	**15-Minute Response Proactive Monitoring**


salesforce