

A Guide to Salesforce Lightning

WHAT'S NEW, WHAT'S GREAT & WHAT'S NOT QUITE THERE YET

sandyx 

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Are you Ready for Lightning?

Salesforce Lightning is a completely new and enhanced way of interfacing with your Salesforce environment.



Since it's unveiling in 2015...

This game-changing UX has been improved and expanded in every release of Salesforce and the platform now has a more modern appearance than ever before. In this white paper, we have analysed some key features of Lightning.

Are you Ready for Lightning?

What is the Lightning Experience?

The Lightning Experience is the new mobile friendly, component-based user interface for Salesforce. It has been reported as extremely helpful for sales teams looking to work faster and more efficiently, as well as beneficial for service team reps when communicating with clients.

It's called Lightning for a reason

- User from G2 Crowd

Takes a while to get used to, but worth it

- User from G2 Crowd

Better than the old Salesforce

- User from G2 Crowd

Effective, but not always intuitive

- User from G2 Crowd

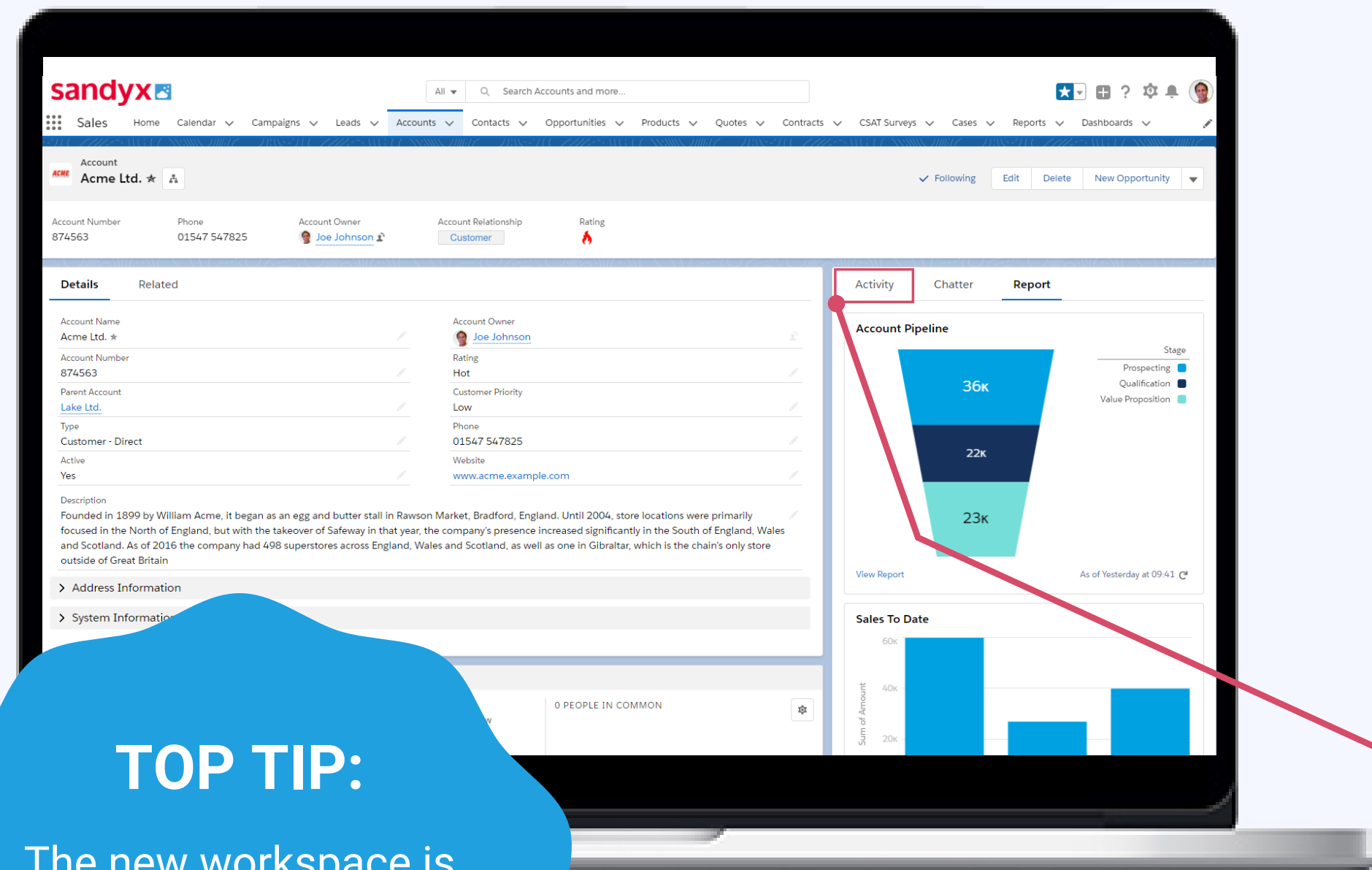
Mother of CRM platforms

- User from G2 Crowd

(The Salesforce Lightning reviews featured above are from G2 Crowd, a software and business solutions comparison platform)

Firstly, an Optimised Work Space

Drive the right behaviours at every stage of your sales process from **the action-optimised work space**.



TOP TIP:

The new workspace is sales-process-based, which means no more scrolling!

What has been optimised?

The handy new composer enables sales teams to quickly log calls, create tasks, send emails and more. The new work space removes any ambiguity about what's left to be done, as scheduled activities appear under Next Steps.

Stay updated with tasks

You can easily configure different work spaces for different objects through the simple drag-and-drop interface and prioritise the most relevant actions, tasks and information so that they appear front and centre for users.

Logged calls, completed tasks, past events and sent emails appear under Past Activity.

Paths and Guidance for Sales Teams

Paths can be used to guide sales people along the steps of a process, such as working an opportunity from a fresh lead to closing the deal.

Accelerate your sales process and support your team

You could even incorporate validation rules to enforce the collection of required data at each stage of the path.

DID YOU KNOW...

Because of features like paths and guidance, **Lightning** users are seeing

22%

higher conversion rates over Classic



According to Salesforce statistics, sales teams using Lightning see a 22% higher conversion rate compared to Classic users

Paths and Guidance for Sales Teams

You can easily configure different work spaces for different objects through the simple drag-and-drop interface.

The screenshot displays the Sandyx Salesforce Lightning interface. At the top, the 'sandyx' logo is on the left, and a search bar with the text 'Search Opportunities and more...' is on the right. Below the search bar is a navigation menu with tabs for Sales, Home, Calendar, Campaigns, Leads, Accounts, Contacts, Opportunities (selected), Products, Quotes, and Contracts. The main content area shows an 'Opportunity' record titled 'Acme Laptop Refresh' with a star icon. To the right of the title are buttons for 'Following', 'Edit', 'Submit for Approval', and 'Delete'. Below the title, a table lists key fields: Account Name (Acme Ltd.), Close Date (21/11/2018), Amount (£23,070.00), Opportunity Owner (Joe Johnson), and Deal Size (a progress bar). A red box highlights the 'Sales Path' section below the table. This section includes a stage selector with a dropdown arrow, a sequence of stages (Value Proposition, Proposal/Price Quote, Closed) with checkmarks, and a 'Mark Stage as Complete' button. Below the stages, there are two columns: 'Key Fields' and 'Guidance for Success'. The 'Key Fields' column lists Amount (£23,070.00), Close Date (21/11/2018), and Next Step. The 'Guidance for Success' column contains a list of instructions: 'Ensure you have an accurate Amount associated with the Opportunity, it should be well qualified by now.', 'Do we have an expected Close Date for the Opp yet? If not, speak to the client and agree one.', 'Have you generated a Quote yet? If so, ensure it is Synced with the Opp!!', and 'What are the next steps for engaging with the client? << Required!'.

Example path:
what your sales teams
will see

You can also personalise and prioritise work, making the most relevant actions, tasks and information front and centre for the user so they cannot be missed. On-boarding new sales team members can be timely as they have a new process to familiarise themselves with, but Lightning's Sales Path makes learning the process quicker and easier.

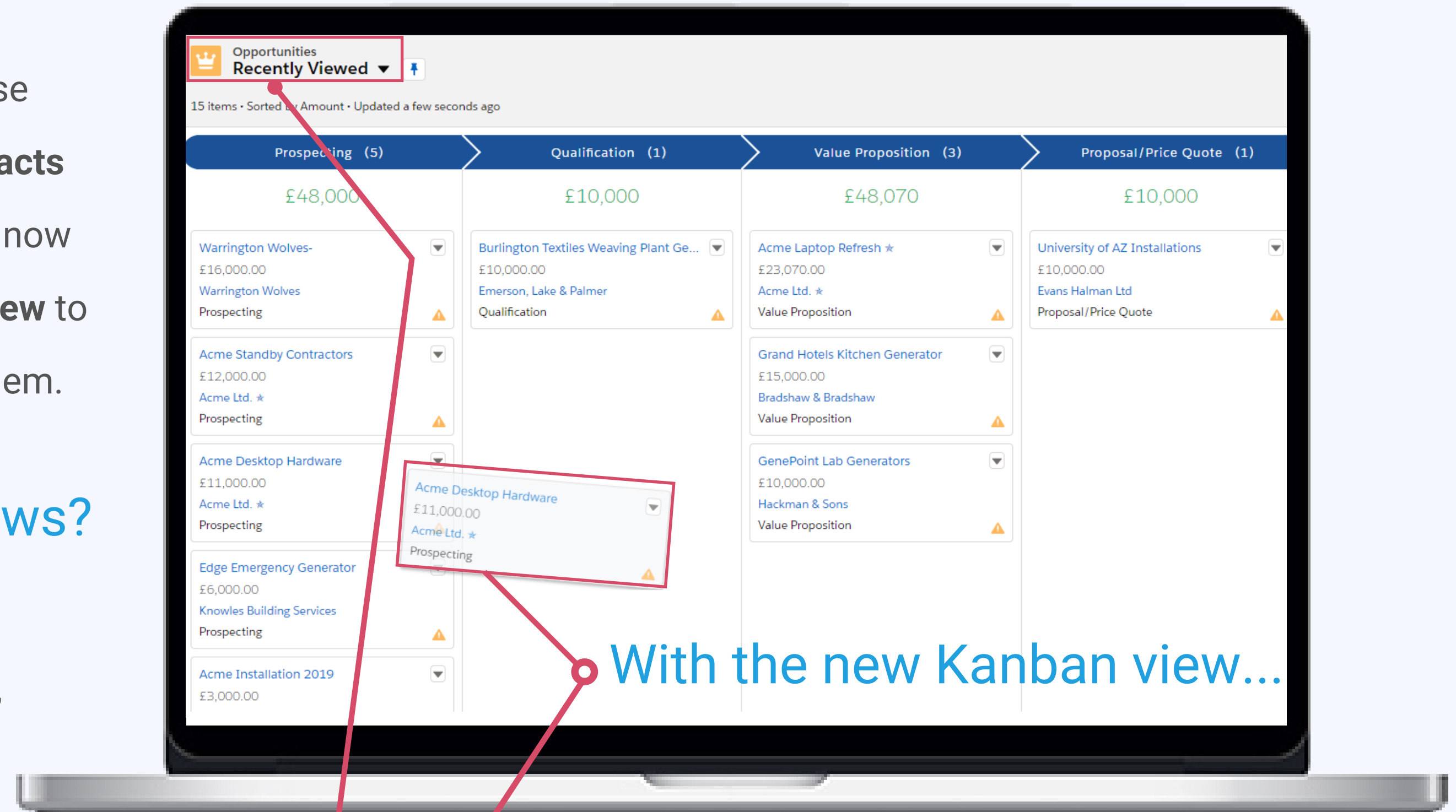
Visualise Workflows with Kanban view

Whether you need to organise **Opportunities, Leads, Contracts** or a custom object, you can now use the **Lightning Kanban view** to easily sort and categorise them.

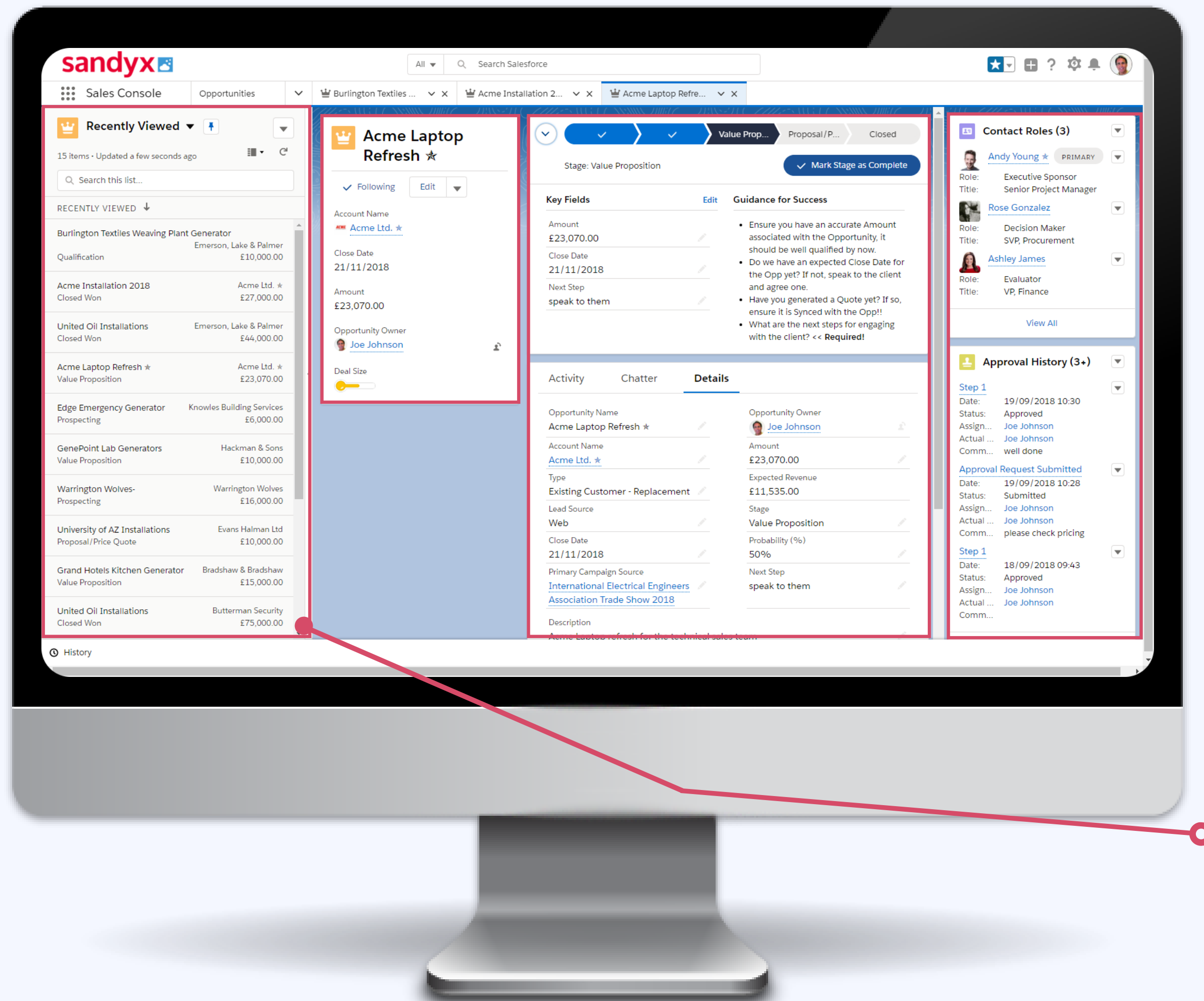
What about List Views?

List Views, even when they're not displayed in Kanban view, have also had a make-over in Lightning.

Not only can you embed charts and filter data on the fly, but you can also pin your favourite List View to its tab, so it opens in place of “Recently Viewed”.



Making the Most out of Split View



Split Views allow your sales people to take multi-tasking to a **new level**, with more information on the screen than ever before.

Benefits of Split View include...

Split view enables your reps to maintain context and visibility within a list while viewing individual records. The collapsible left pane keeps the List Views close to hand, but easy to hide when you need more screen real estate.

Making the Most out of Split View



DID YOU KNOW...

salesforce

Because of features like Split View...



Lightning users are seeing a

23%

improvement
in time to close
over Classic



Split View is great for a tele-sales team that are working down a list of Leads and Contacts, allowing them to easily pull up the List View without losing the context of the records they are working on.

'Time to close' refers to how long the process takes from a prospect/customer first getting in contact to the final payment step.

What is the Lightning Utility Bar?

The **Lightning Utility Bar** displays a useful set of links to a user, at the bottom of every page.

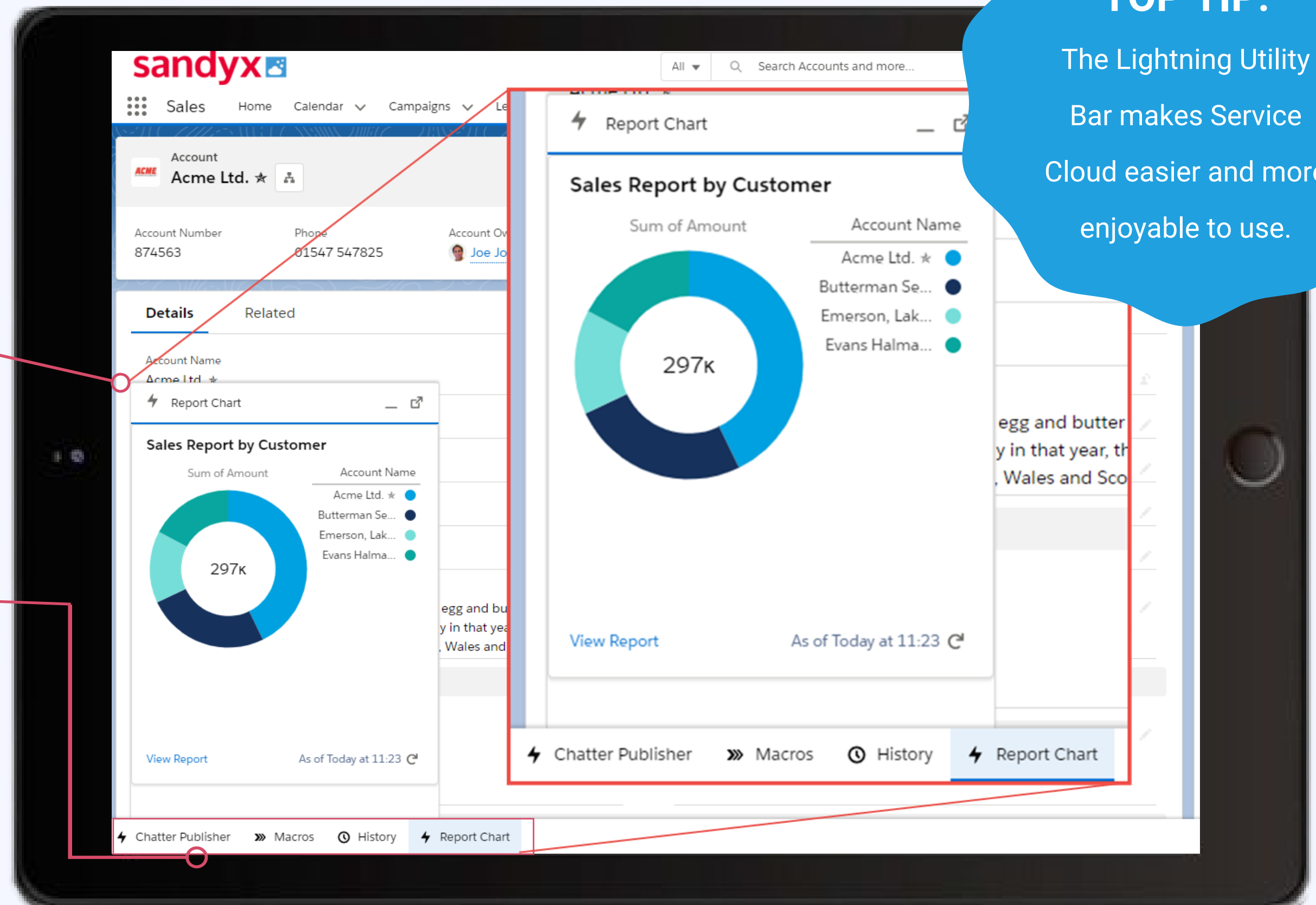
It gives users instant access to an almost limitless pool of standard and custom tools, with just the simple click of a button.

What does the Utility Bar look like?

The Utility Bar sits at the bottom of the page as a fixed footer, and can be customised per app.

TOP TIP:

The Lightning Utility Bar makes Service Cloud easier and more enjoyable to use.



What is the Lightning Utility Bar?

The ability to launch a custom flow or even one of your Visualforce pages, alongside other commonly-used utilities like Notes or History, means you can do pretty much anything - and at any time.

Need to see all the notes for a customer?

No problem.



Want to quickly review this years spend from a client?

Click & sorted.



If you have used the Classic Salesforce Console, you may remember a feature called the footer which was similar to the Utility Bar and served a similar purpose. The Lightning Utility Bar however is significantly more enhanced in comparison.

Savvy Email Integration

You can now bring the power of Salesforce Lightning directly into your users' Gmail (shown) or Outlook* email client with **the new email integration feature**.

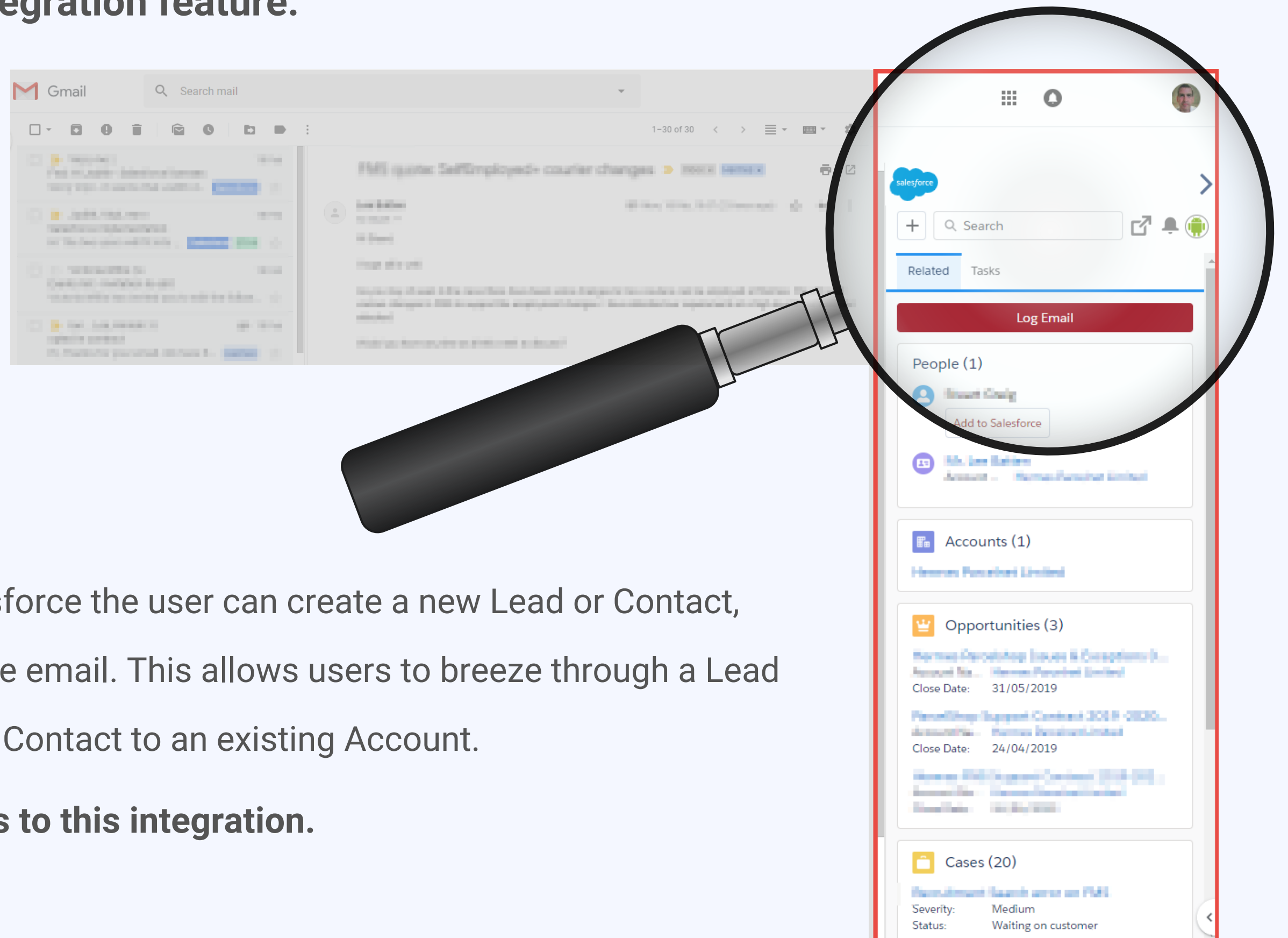
What does this mean?

This allows users to see related information such as Opportunities or Cases associated with this email.

What about new contacts?

If the email address is unknown to Salesforce the user can create a new Lead or Contact, using information pulled directly from the email. This allows users to breeze through a Lead enrolment process or quickly add a new Contact to an existing Account.

***There are Outlook version limitations to this integration.**



Reports & Dashboards: Attractive yet adaptive

More detailed reports & a new UI

With the Lightning lay-out, animated and interactive charts illustrate your data. A robust report run page is easier to read and filter. The dashboard editor now supports more than three columns and features components that span multiple columns and rows.

One of the most obvious enhancements in Salesforce Lightning are **the changes visible in Reports and Dashboards.**

TOP TIP:

Lightning allows reports to be shared easier and faster than ever before.



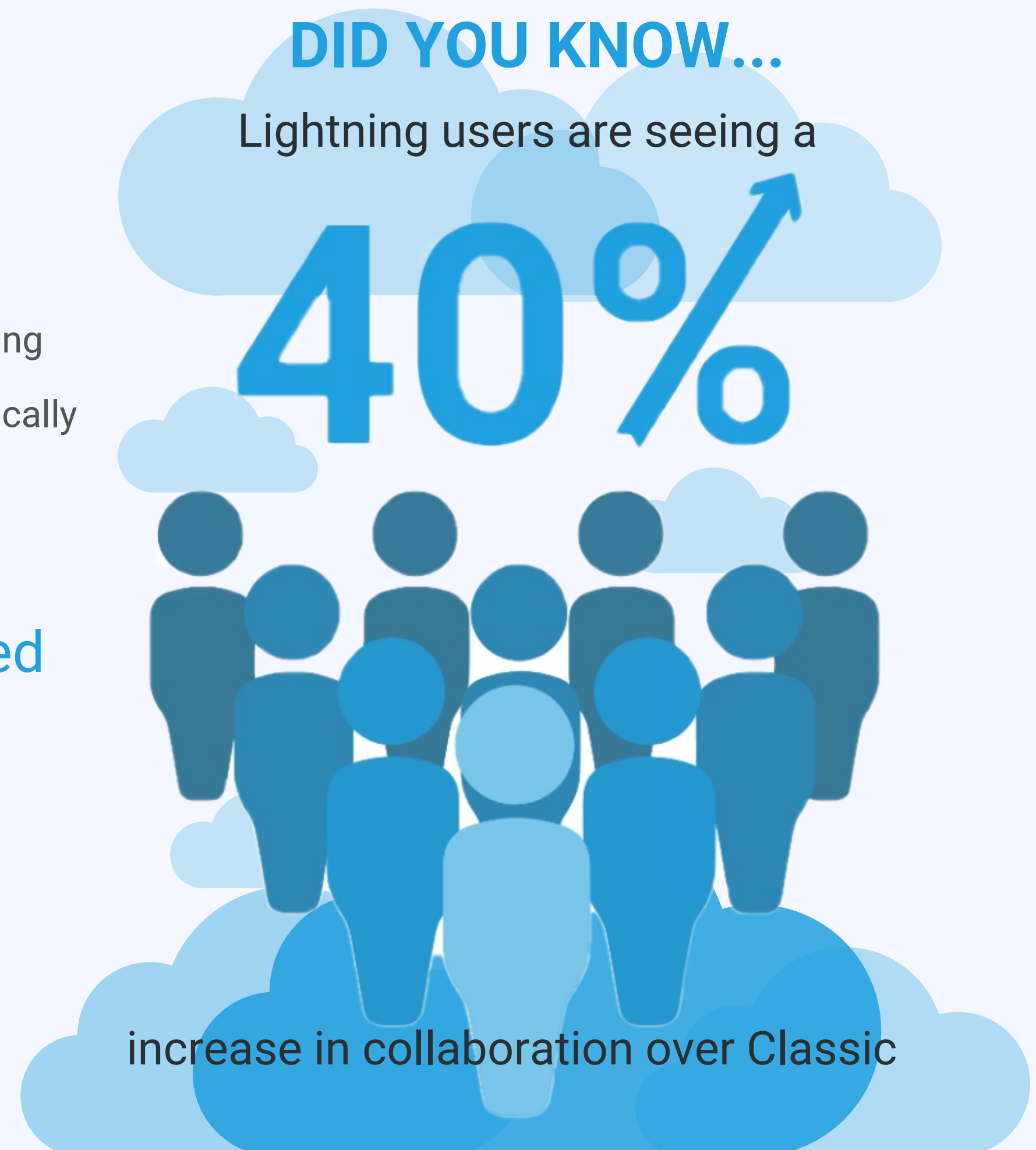
Reports & Dashboards: Attractive yet adaptive

A surprisingly simple transition

You can transition easily from Salesforce Classic to Lightning Experience with Reports and Dashboards that are automatically viewable in the new interface.

Find all your previous settings unaltered

The new Lightning Reports and Dashboards are also able to inherit all permissions and sharing settings that you defined in Salesforce Classic - which simply makes the transition even easier!



The Potential Problems!

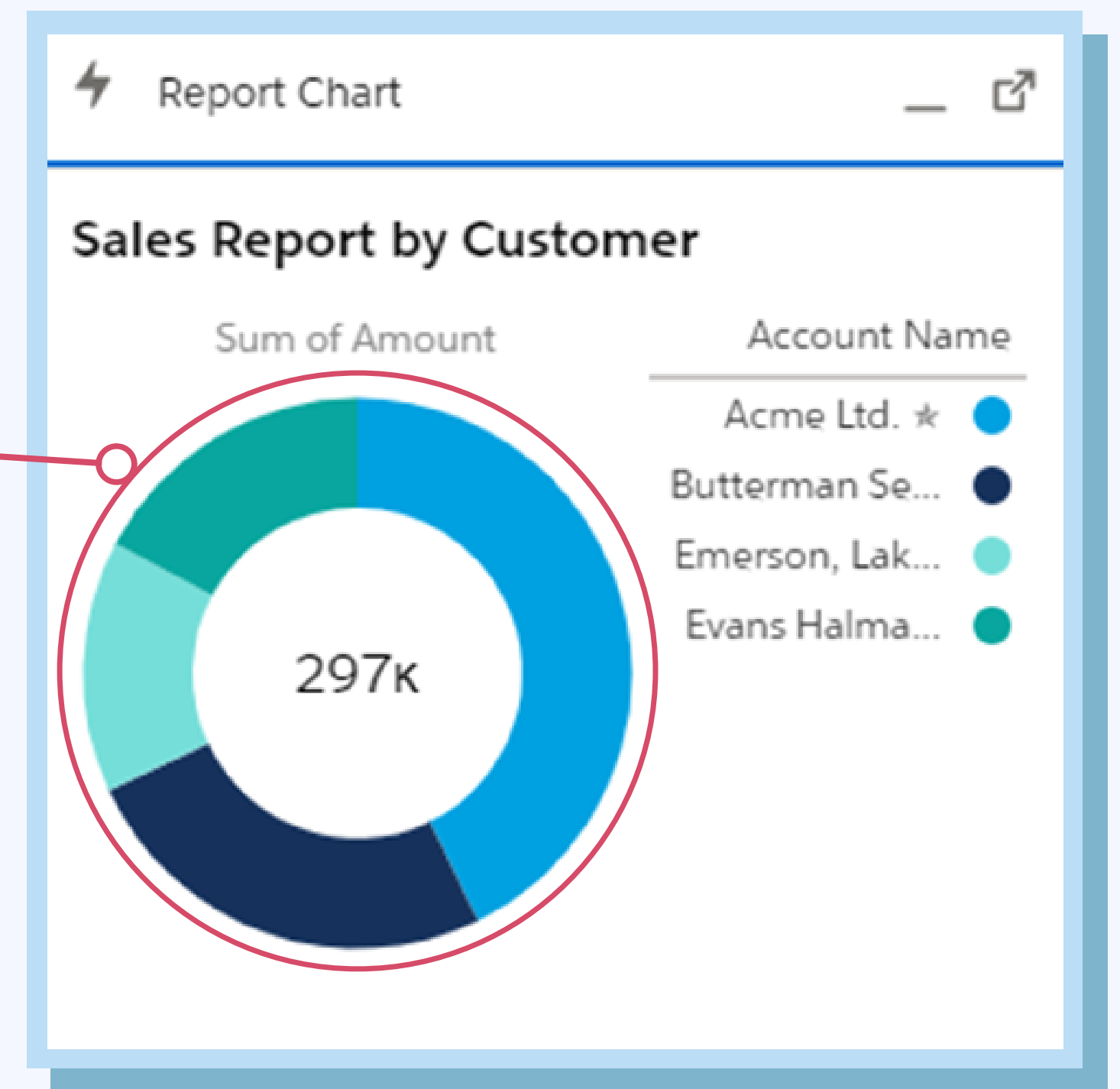
Overall, the Lightning Experience has proven to be very popular with users - especially with those who are completely new to Salesforce. **However, it's not quite right for a small percentage of Salesforce users....**

New Donut Charts

Editing a Dashboard in Lightning is a one-way street, meaning you can't then edit it in Classic, and Pie Charts have now been replaced by Donut Charts.

The missing features

If you use Contact Roles on Accounts or Cases for example, these do not currently work in Lightning. Customisable Forecasting is also missing and, according to Salesforce, it is unlikely to be included in the future. Deleted records will still be sent to the Recycling Bin however you need to switch back to Classic to recover them.



The Potential Problems!

Missing features & different appearances

One of the biggest challenges will be for long-established Salesforce environments, where there's a good chance you will have developed custom Visualforce pages to meet specific needs. Although these will probably still work, they won't look quite right when you switch over to Lightning. The traditional Classic styling will be maintained, yet positioned in a Lightning page.

TOP TIP:

Lightning may be turned on for all Orgs by October - Sandyx can help you transition if this time-frame scares you.

- Above is an example of a custom-built Visualforce page which we use at Sandyx, however the highlighted area is not yet fully compatible with Lightning and appear as shown.

Contact Us

If you have any questions about moving your Salesforce environment to the new Lightning interface then please get in touch. **We can help guide you through the transition.**



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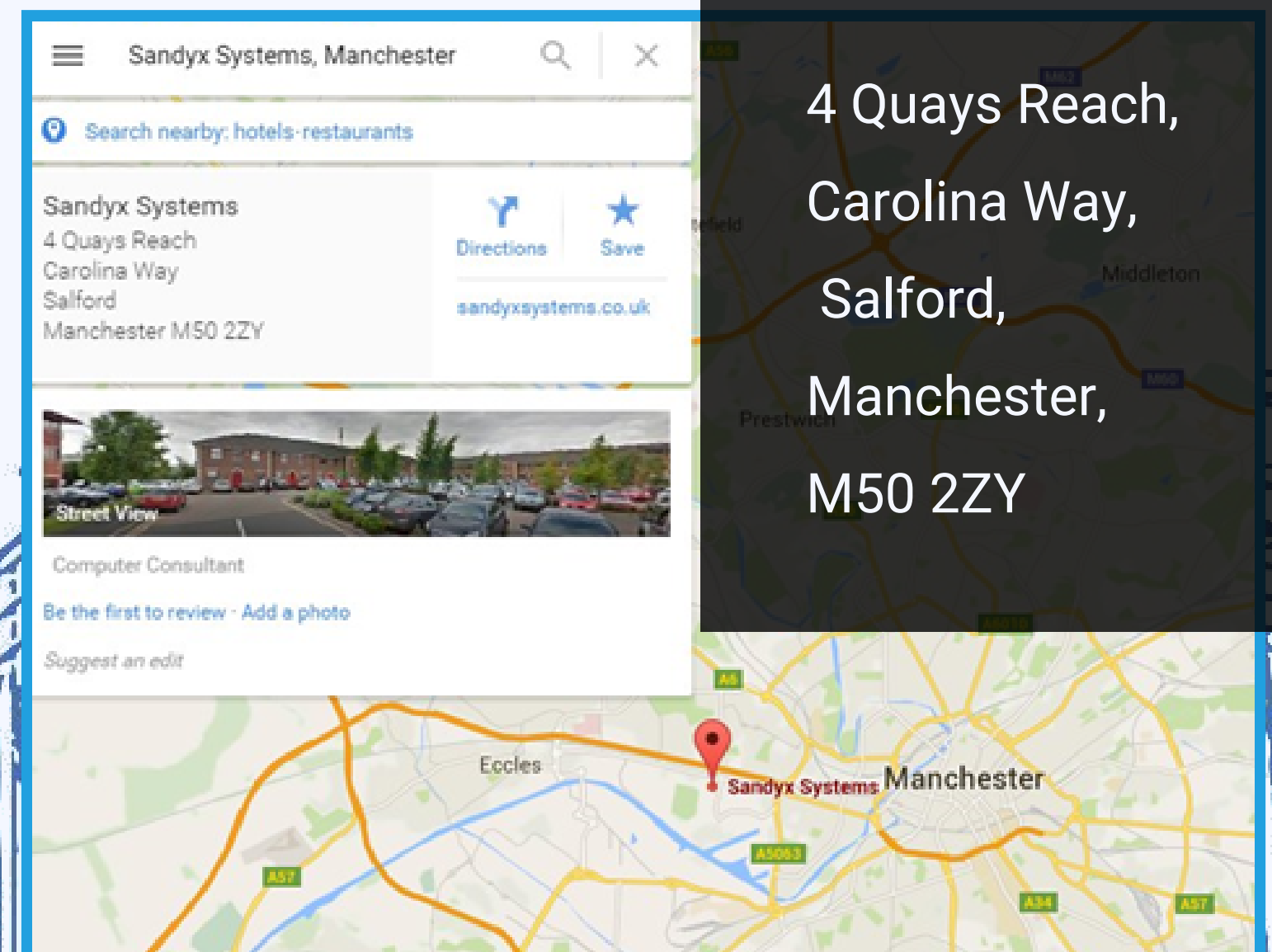
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