



KENNEDY & COMPANY



TRANSITIONING TO THE SALESFORCE LIGHTNING EXPERIENCE

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Your Speakers



Mickey Baines, Principal

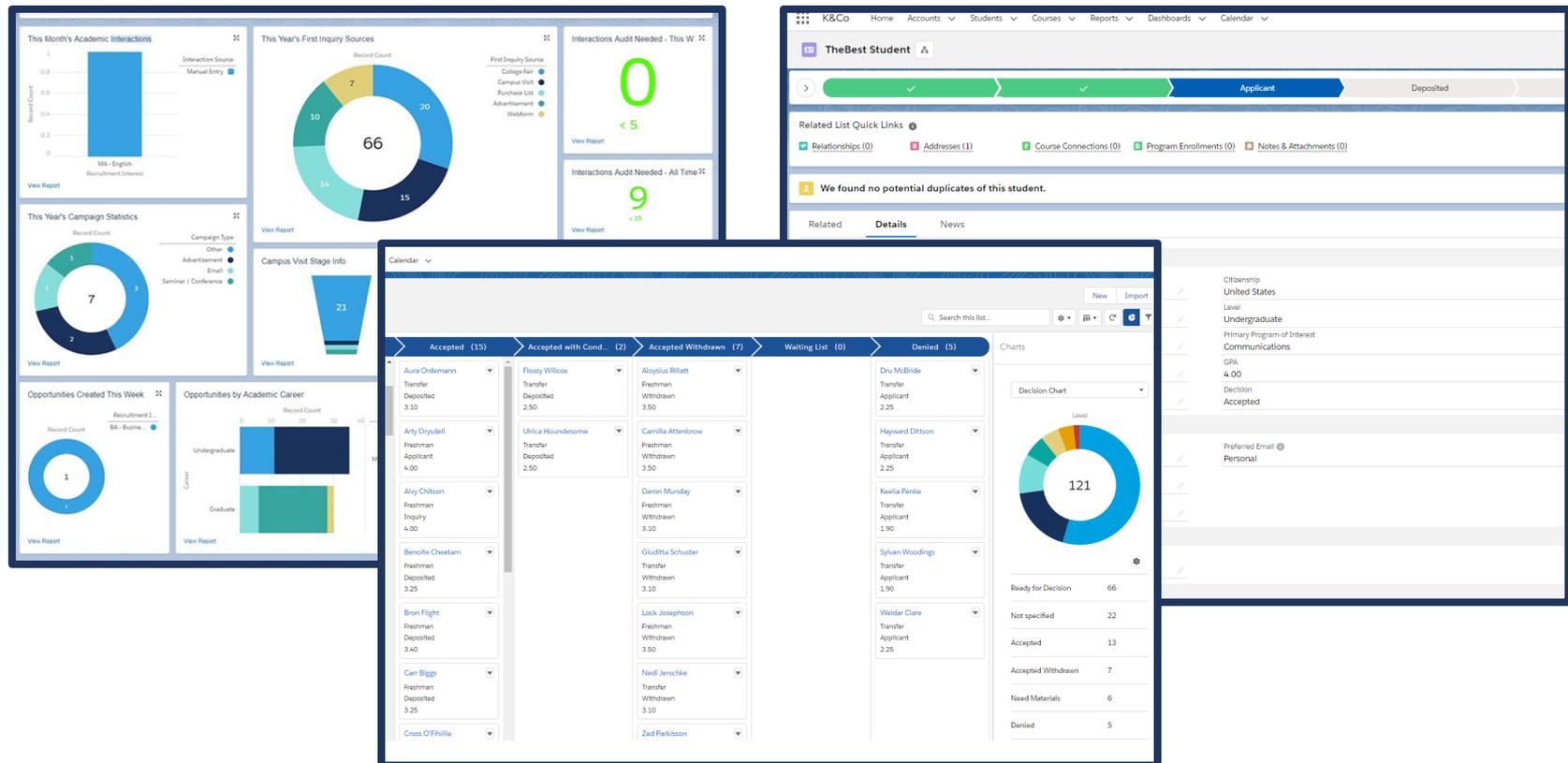


Kevin Derstine, Technical Associate

TRANSITIONING TO THE SALESFORCE LIGHTNING EXPERIENCE

What is the Lightning Experience?

Lightning Experience is a significant upgrade to the user interface of the Salesforce platform, including many new features with a more modern look and feel



TRANSITIONING TO THE SALESFORCE LIGHTNING EXPERIENCE

Be Educated: Why the change to Lightning?



Be Ready: Preparing your org for the transition



Be Strategic: Positioning for full adoption

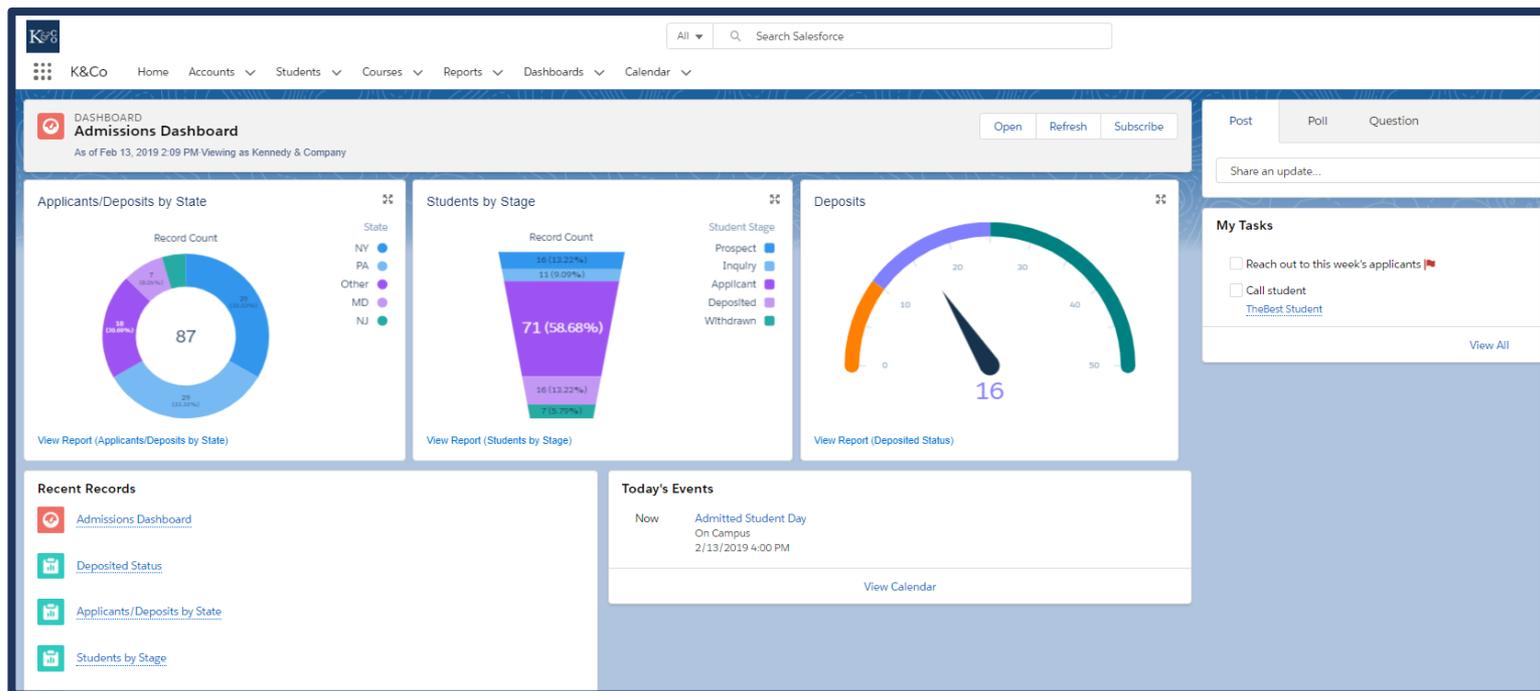


Successful Launch

BE EDUCATED

Understand why the switch to Lightning is important, and why it will ultimately be better for your users.

- Salesforce is focusing all of its advancement resources toward the Lightning platform and does not plan to make updates to the Classic interface
- If Salesforce is putting its energy into the Lightning user experience, then time spent in Classic is time not fully capitalizing on the value of the product
- A successful launch and adoption will mean increased productivity for your users and a more streamlined tool for your business processes



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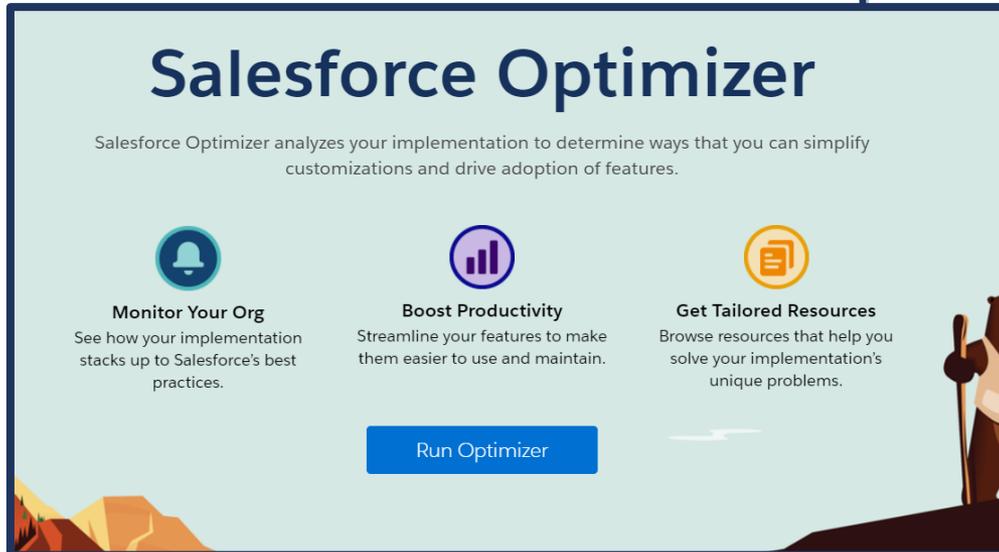


Successful Launch

BE READY

Use the free resources Salesforce provides to prepare your org for the transition.

- Lightning Experience Migration Assistant
- Lightning Experience Readiness Check
- Salesforce Optimizer Report

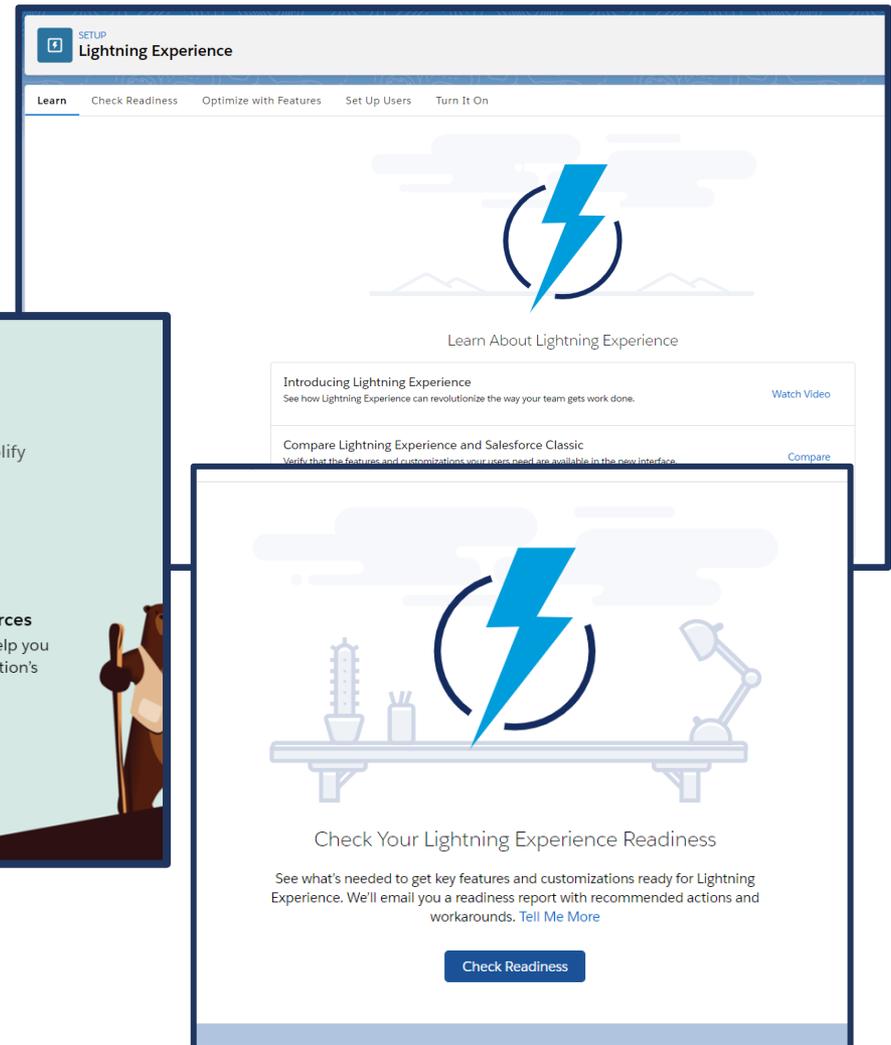


Salesforce Optimizer

Salesforce Optimizer analyzes your implementation to determine ways that you can simplify customizations and drive adoption of features.

- Monitor Your Org**
See how your implementation stacks up to Salesforce's best practices.
- Boost Productivity**
Streamline your features to make them easier to use and maintain.
- Get Tailored Resources**
Browse resources that help you solve your implementation's unique problems.

[Run Optimizer](#)



SETUP Lightning Experience

Learn Check Readiness Optimize with Features Set Up Users Turn It On

Learn About Lightning Experience

Introducing Lightning Experience
See how Lightning Experience can revolutionize the way your team gets work done. [Watch Video](#)

Compare Lightning Experience and Salesforce Classic
Verify that the features and customizations your users need are available in the new interface. [Compare](#)

Check Your Lightning Experience Readiness

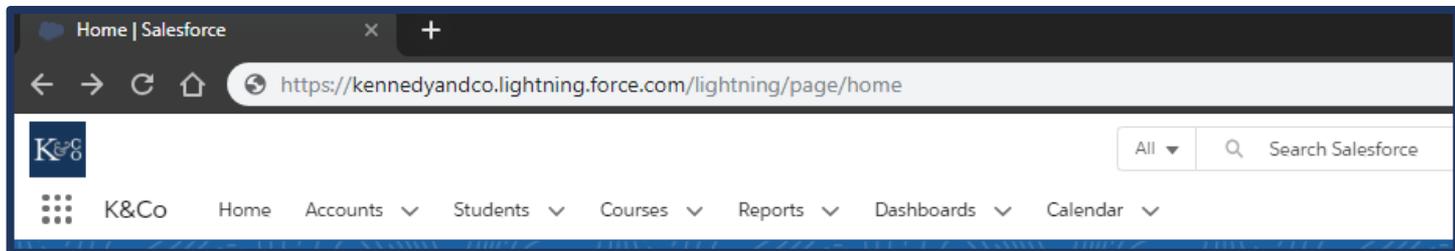
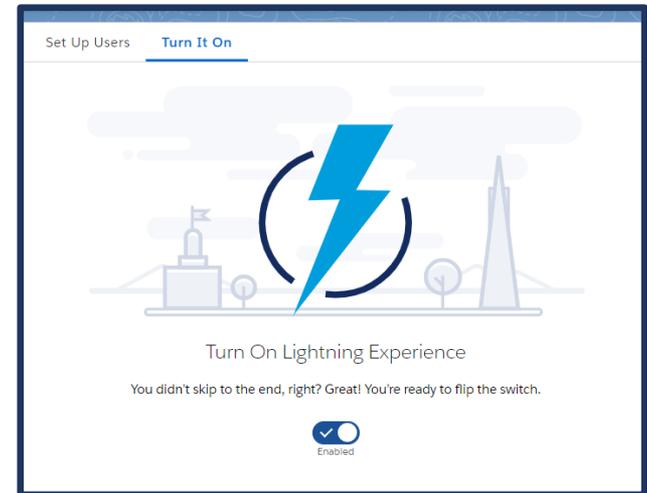
See what's needed to get key features and customizations ready for Lightning Experience. We'll email you a readiness report with recommended actions and workarounds. [Tell Me More](#)

[Check Readiness](#)

BE READY

Prioritize and understand the key areas that should be addressed prior to full launch– Here are three that we recommend:

1. Activate “My Domain” – a custom subdomain that will be a part of the URL for your org
2. Know the differences between Attachments/Documents (Classic) and Files (Lightning)
3. Decide on your approach to Lightning rollout



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Successful Launch

BE STRATEGIC

Position your users for full adoption and eliminate negative impacts

- Pay special attention to your layouts, tabs and apps
- Master efficient navigation of the interface
- Prepare your users ahead of launch
 - Meet with representatives from each key area/department to understand how they use Salesforce each day
 - Research and implement Lightning features that will help the users in productivity
 - Train each user group and highlight the features you have tailored for them
 - Provide your users with resources to learn more

The screenshot displays a Salesforce Lightning interface for a 'Students' list. The table lists 20 students with columns for Name, Student Type, Student Stage, GPA, Level, Decision, Email, and Mailing City. The 'Decision' column for the 6th student, 'Antone Minguet', is highlighted with a blue box and a dropdown menu showing 'Ready for Decision'. To the right, a 'Charts' panel features a donut chart titled 'Decision Chart' with a total count of 121. Below the chart, a table shows the distribution of decisions: 'Ready for Decision' (64), 'Not specified' (22), and 'Accepted' (15).

ID	NAME	STUDENT TYPE	STUDENT STAGE	GPA	LEVEL	DECISION	EMAIL	MAILING CITY	MAILIN...	STUDEN...
1	Adelind Bottjer	Freshman	Inquiry	4.00	Undergraduate	Ready for Decision	abottjer1c@printfriendly.com	Trenton	NJ	KCo
2	Ahmad Plerucci	Freshman	Inquiry	3.00	Undergraduate	Ready for Decision	aplerucci@shinystat.com	Albany	NY	KCo
3	Aloysius Rillatt	Freshman	Withdrawn	3.50	Undergraduate	Accepted Withdrawn	arillatt21@cmu.edu	Ridgely	MD	KCo
4	Aly Chitson	Freshman	Inquiry	4.00	Undergraduate	Accepted	achitson1d@mysql.com	Baltimore	MD	KCo
5	Annalise Piggrem	Freshman	Inquiry		Undergraduate		apiggrem6@youtu.be	Levittown	PA	KCo
6	Antone Minguet	Freshman	Inquiry	3.00	Undergraduate	Ready for Decision	h.edu	Philadelphia	PA	KCo
7	Ardelle Klimuk	Freshman	Inquiry		Undergraduate		aklimuk9@govuk	Baltimore	MD	KCo
8	Ardith Barry	Freshman	Applicant	2.95	Undergraduate	Ready for Decision	abarry1v@alexa.com	Baltimore	MD	KCo
9	Armin Tolwood	Freshman	Prospect		Undergraduate		atolwood2q@blogtalkradio.com	Syracuse	NY	KCo
10	Arney Strafford	Freshman	Applicant	3.00	Undergraduate	Ready for Decision	astraffordk@symantec.com	Albany	NY	KCo
11	Ash Mulrooney	Freshman	Inquiry		Undergraduate		amulrooney5@columbia.edu	Newark	DE	KCo
12	Asher Deinhardt	Freshman	Applicant	4.00	Undergraduate	Ready for Decision	adeinhardt13@cafepress.com	Buffalo	NY	KCo
13	Aura Ordemann	Transfer	Deposited	3.10	Undergraduate	Accepted	aordemann2c@123-reg.co.uk	Philadelphia	PA	KCo
14	Barnabe Edelheit	Freshman	Applicant	3.00	Undergraduate	Ready for Decision	bedelheilt@furl.net	Silver Spring	MD	KCo
15	Beltran Sandcraft	Freshman	Applicant	4.00	Undergraduate	Ready for Decision	bsandcraft13@dion.ne.jp	Philadelphia	PA	KCo
16	Benoite Cheetam	Freshman	Deposited	3.25	Undergraduate	Accepted	bcheetam26@ft.com	Ridgely	MD	KCo
17	Billie Atmore	Freshman	Inquiry		Undergraduate		batmore4@yellowpages.com	Rochester	NY	KCo
18	Blinny Holbury	Freshman	Applicant	3.00	Undergraduate	Ready for Decision	bholbury1@wired.com	Newtown	MA	KCo
19	Bobina MacGinlay	Freshman	Applicant	2.80	Undergraduate	Ready for Decision	bmacginlay1t@uccc.com	Boston	MA	KCo
20	Brenden Offin	Freshman	Applicant	4.00	Undergraduate	Ready for Decision	boffin1p@so-net.ne.jp	Albany	NY	KCo

Charts

Decision Chart

Level

121

Ready for Decision	64
Not specified	22
Accepted	15

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Successful Launch

NOW LAUNCH!

Give your co-workers a reason to stay-- Your launch is only successful if Users remain in Lightning

- Monitor usage and affirm those who are embracing the change
- Seek out feedback
- Dedicate time toward enhancing the tool
- Read the product roadmap and stay up-to-date with release notes

The screenshot displays a student profile for 'TheBest Student'. At the top, there are action buttons: '+ Follow', 'Edit', 'New Student', and 'New Opportunity'. Below this is a table of student information:

Student Stage	Student Type	Level	Mobile	Email
Applicant	Freshman	Undergraduate	(814) 1819740	adrysdell1o@google.pl

A progress bar shows the student's journey through stages: Applicant (highlighted in blue), Deposited, Withdrawn, and Enrolled. A button 'Mark Student Stage as Complete' is visible at the end of the bar.

Key Fields

Name	TheBest Student
Student Owner	Kennedy & Company
Student Type	Freshman
Decision	Accepted
Primary Program of Interest	Communications

Guidance for Success

- Stay in weekly contact
- Emphasize timeline
- **Always** be aware of the review committee's decision

Related List Quick Links

- Relationships (0)
- Addresses (1)
- Course Connections (0)
- Program Enrollments (0)
- Notes & Attachments (0)

RESOURCES

- Salesforce Docs: [Lightning Experience Considerations](#)
- Salesforce Trailhead: [Lightning Experience for Classic Users](#)
- Salesforce Docs: [Lightning Experience Roadmap](#)
- Salesforce Docs: [Differences Between Files, Salesforce CRM Content, Salesforce Knowledge, Documents, and Attachments](#)
- TargetX Community: [How can I use Salesforce Lightning Experience with TargetX](#)
- TargetX Community: [Application Review Tool and Salesforce Lightning](#)
- TargetX Community: [Replace Email Campaign and Broadcast S-Controls with Lightning Compatible Components](#)

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