

Salesforce Lightning: Not just a Visual Uplift but an Opportunity to reimagine your Business Process



Gain insights on how orchestrating Salesforce Lightning has revolutionized user experience and redefined customer relationship management.

Executive Summary

The race to own customers through their experience is on! Today, technology is restating the importance of experience over building an excellent product or service, an experience that makes them stand out. Since its inception in 1999, Salesforce's top priority has been to harness this amazing culture of innovation to deliver solutions that enable customers' digital transformation. With its new recipe of user experience (UX), built from the feedback of 150,000 customers, Salesforce is moving a step closer to increase its user's efficiency, engagement, and collaboration.

This white paper intends to focus on the key components of the Salesforce Lightning framework. It attempts to highlight why Salesforce is keen on enhancing the user experience. It digs into that via understanding why customer experience has become important to innovation. Why businesses today view enhanced customer experience as the key value driver to product innovation. The whitepaper then reveals how the switch to Salesforce Lightning Experience can sustain companies' growth and bridges the gap between their processes and customers' demands. It states a few business cases that demonstrate how the shift from Salesforce Classic to Lightning made a difference to the ROI. It also dives deep into each Lightning components, features, and enhancements. Finally, the whitepaper introduces a meticulously tailored Solunus rollout strategy with ready-to-use, prebuilt Lightning Components that help customers transform their current Salesforce Classic environment into a Lightning ecosystem across multiple industries and clouds.

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WHY SO MUCH EMPHASIS ON CUSTOMER EXPERIENCE?

Salesforce Lightning - Salesforce's answer to enhancing User Experience

Today, businesses' primary focus is to improve customer experiences because customers don't just buy a product but perceive the entire process as an experience or memory. Hence when dealing with a customer, brands today look at the interaction in a way to immerse them in the experience. Customers today have more say and are interacting more with a brand than ever.

According to the PwC report on the customer experience – 'Experience is everything,' up to 80% of customers believe that the essential elements of positive customer experiences are speed, convenience, and knowledgeable help. That means, customers value user-friendly interfaces and don't want to sacrifice speed for design. Customers expect technology to work and are quickly frustrated when it doesn't.

What people value most in their customer experience

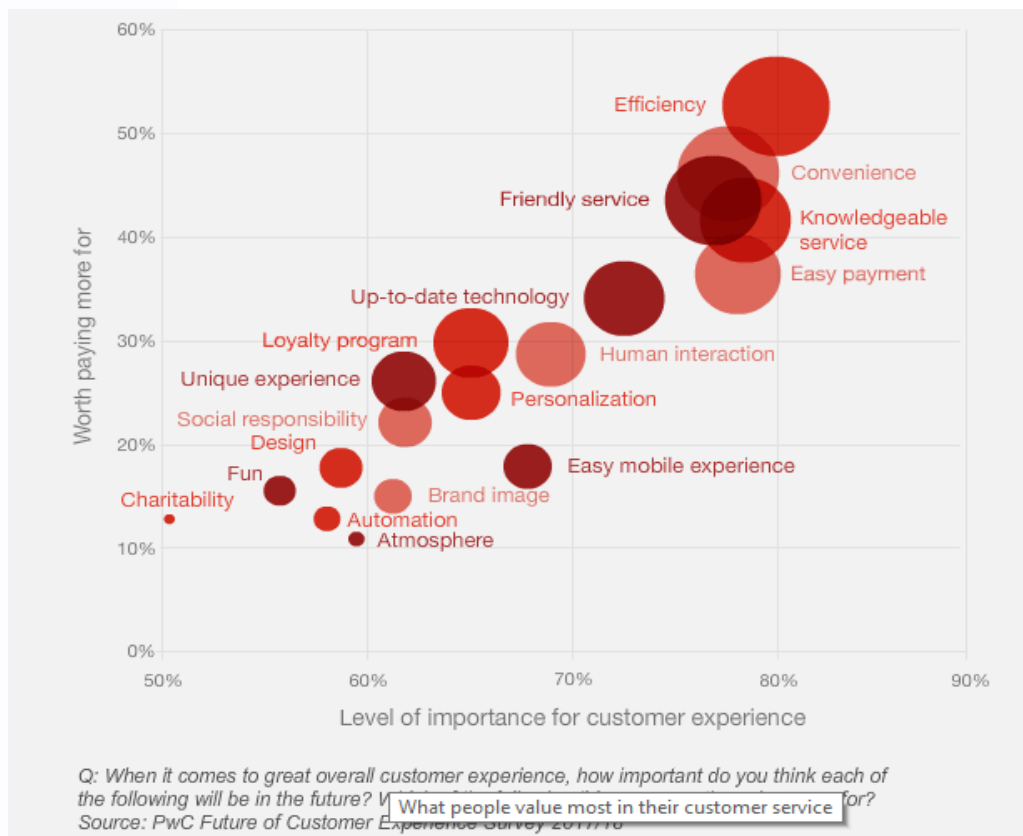


Figure 1

Source : <https://www.pwc.com/us/en/services/consulting/library/consumer-intelligence-series/future-of-customer-experience.html>

Salesforce included these top three elements in its product, Salesforce Lightning. Lightning's UX is the answer to questions like how does your sales team coordinate internally? Is the interface appropriate to achieve the speedy replies customers expect? Is your team able to quickly locate where to find their answers? Salesforce Lightning helps companies to achieve the anticipated customer experience through its modern user experience, which intends to bridge the gap between customers and businesses. Specifically, Salesforce Lightning helps both IT and business users. It boosts productivity and optimizes sales and service operations while allowing IT to bring new applications to market faster and meet customer demands. Not just that, Salesforce ensures that Lightning is updated regularly with extensions and enhancements to stay at par with the evolving industry standards.

Customer experience is a crucial differentiator of today’s businesses, and Gartner says that 89% of companies today compete with each other based on customer experience. Salesforce Lightning is a huge step in this direction, as the framework puts Salesforce in a strong position to enhance user experience in the modern day business environment. This changes the way businesses are set up and shifts the focus entirely on the customer.

EVOLVE YOUR BUSINESS TO THE NEXT LEVEL WITH SALESFORCE LIGHTNING

You might be thinking, so ‘What’s in it for me’? Every business does. Although the Salesforce Classic user interface offers a good deal of CRM features, end users are still looking for fewer clicks and a more user-centric design approach that includes features such as drag and drop. The Lightning platform gives you the ability to review your business processes and make a cultural shift in terms of speed and increased productivity.

The most important aspects of Lightning that drives businesses’ success are enhanced productivity, and out-of-the-box configuration. Lightning offers numerous ways to enhance productivity, which in turn creates a more effective way to work and engage with customers. The out-of-the-box configuration allows your IT folks to spend less time customizing processes. Let’s drill down into the multiple ways Lightning improves your business processes.

Building Solid Business Cases for Lightning Migration

Understanding the features of Salesforce Lightning and their impact on your business would help you decide whether to migrate, if so, to which persona. The main factors that drive business value when it comes to Salesforce Lightning are:

- Enhanced Productivity
- Increased adoption and collaboration
- IT productivity and cost savings

On a higher level, the below image sheds light on how Lightning features help achieve the aforementioned business initiatives.

Business Benefits of Switching to Lightning

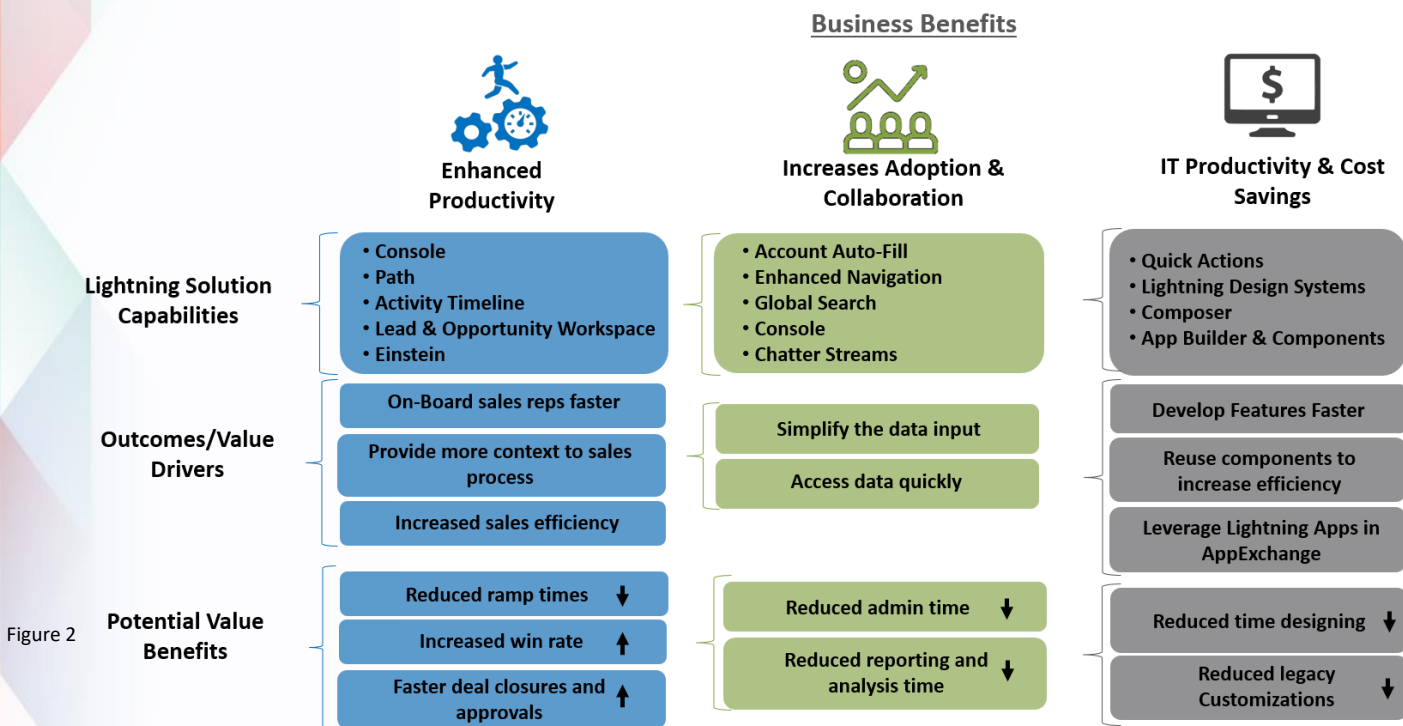


Figure 2



Enhanced Productivity

Onboarding sales force:

Every business wants a more productive sales force and the first step to achieve that is a successful onboarding. It's alarming to observe that an astounding 71% of companies take six months or longer to onboard sales employees, research from CSO Insights. While on the contrary, practical training, particularly in the areas of onboarding and sales methodology showed a great effect on attaining better quota. Salesforce Lightning has the potential to accelerate the sales onboarding process which is usually beyond 50 percent or more. The Lightning Console gives the sales force all the sales tools at their fingertips to prospect leads, closed deals, and manage relationships. It helps the sales folks to jump-start their Salesforce adoption and start selling rather than getting into administrative work.

Provide more context to the sales process:

As Lightning offers an intuitive design, more productivity tools, and Einstein artificial intelligence, it redefines the user experience for CRM. Lightning has proved to enable companies to close deals up to 23 percent faster and boost productivity by up to 41 percent. Lightning helps companies to maximize the value of Salesforce investment by providing a more intuitive user interface, flexible page layouts, and drag-and-drop Kanban views, so that the sales reps have all the key information at-a-glance. It also increases the sales team's mobile adoption by 41 percent. Salespeople can streamline quotes and renewal processes that give representatives considerably more time each week to spend building deeper relationships with the prospects.

Increased efficiency:

Salesforce Lightning's "guided selling" experience standardizes and automates the sales process and bookings to increase sales productivity and close rates. Companies can improve renewal operations by ensuring customer account details are updated and available

instantly to service reps. Salesforce claims that this reduces the time to resolution for IT cases by 83 percent. Lightning reduces clicks for its sales teams and helps them to be more productive in the office and on the road with Kanban views, mass inline editing, improved email integration, guided opportunity paths, and more robust analytics. In addition, Lightning's drag-and-drop capabilities and Components Library will simplify day-to-day tasks for its admin and development teams.



Increased Adoption and Collaboration

Resolve data issues:

Salesforce Lightning reduces administrative time by giving the sales team a simple way to manage their calendars and contacts while reducing the manual data entry work. Creating new accounts just got quicker than ever with the Account Autofill where salespeople can minimize time spent typing data into records. They can now create new accounts faster because of Salesforce autofill and provide data suggestions based on the Data.com. It's seen that the steady adoption of Sales Cloud Lightning has resulted in 5-10 hours a week of time savings back to sales reps. What does that mean to you?

20-40 hours a month per resource X 12 X No. of sales reps in your company = Huge annual savings!

Not just that, with Lightning's Enhanced Navigation, you can get to the right record faster. These instant results take the reps to the right contact or opportunity or provide more relevant suggestions. Also searching for records has never been this easy, Lightning's Global Search helps you to filter and sort your search results to quickly find what you need.



IT Productivity and Cost Savings

Develop features faster:

Salesforce Lightning lowers development and support costs by 37% of the total benefits. The component-based framework from Lightning enables organizations to deploy customizations without writing code, leverage base components for reuse, and deploy applications faster. Companies were able to see a 5 percent ROI from an eighty percent reduction in application developer turnover rates with the Lightning Platform. For the most part, it takes some tweaks in your code and a few things to remember. The deployment of Lightning also increases developer engagement and reduces the developer turnover rates that can result in avoiding hiring costs of \$169,106.

Reusable components for efficiency:

With Salesforce Lightning, developers could reuse application components resulting in fewer errors, less reliance on user experience (UX) and UI resources to deliver applications, and increased application quality.

Additionally, it improves process efficiency and application quality by allowing IT teams to spend less time on process standardization and developer training.

Leverage Lightning Apps in AppExchange:

AppExchange for Lightning provides quick time-to-market with 50% faster application deployment. It's observed that organizations cited faster time-to-market as a benefit, as they could develop and deliver applications faster with the Lightning platform. Organizations could bring applications to previously unreachable channels such as mobile, which will drive future projects for users. Companies noted that the ability to leverage base components for reuse with Lightning enabled their Salesforce development teams to innovate and deliver needed applications to the business quickly.

MASTER YOUR ART OF BUILDING WITH THE LIGHTNING PLATFORM

With Lightning, Salesforce has moved a step ahead of the page-centric model which was an intrinsic part of Classic. Salesforce aims at improving productivity and user experiences with its app-centric approach. To put this in perspective, with Classic you would send an interaction to the Salesforce server to update the entire page, but with Lightning, you can interact with Salesforce server to update each specific component. This, in itself, has a considerable impact on the performance and the fluid motion of a user interface.

Although organizations realize the importance of enhanced user experience, there's a need for them to understand the platform better because Lightning is more than just an update to the user interface. There is a surfeit of things that can be done by it like build apps faster, create custom business logic, customize your user interface, integrate with third-party applications easily, and more.

Additionally, Salesforce says that Lightning will be the focus for all new Salesforce innovation. Hence, the best way to approach Salesforce Lightning is to think strategically about all individual pieces of the platform and how you can use them in tandem with one another across different channels.

Deep dive into Lightning Platform capabilities

Lightning Experience	<p>A more simplified interface optimized for speed: Lightning Experience is a component-based framework for developing applications on Salesforce. Although Classic user interface delivered a lot of CRM functionality, Salesforce realized there was abundant room to simplify processes for business users, who do not have programming experience. To address this challenge, Salesforce introduced a user-centric design approach via Lightning Experience. Most interesting features like redefined home page experience, Kanban view for the opportunity, enhanced workspaces, new dashboards, Lightning eases application development for either mobile or desktop.</p>
Lightning Framework	<p>A UI framework for building apps for mobile and desktop devices: The Lightning Framework is an event-driven architecture that powers applications to run in Lightning Experience. It provides the out-of-the-box components, runtime environment, and required libraries to build custom components. Publishing your components and sharing them with other users is also easy. It also acts as a bridge between client side and server side and translates every user interaction on the screen into action. It empowers teams to work faster and facilitates parallel design, improving overall development efficiency. Additionally, it allows the same component to be configured differently in different locations of the app, further enhancing component reusability.</p>
Lightning App Builder	<p>A point-and-click tool to create custom pages easily: Dependency on an architect or developer to build a custom application can become a hindrance in today's competitive world. Because developing and releasing a custom app typically takes weeks or even months, creating a significant delay in time-to-market and thus preventing organizations to meet customer needs. With the Lightning App Builder, Salesforce created an easy way to use, drag-and-drop technology that helps the non-technical folks to rapidly compose applications according to business requirements. Lightning App Builder not only accelerates app development but also serves as a one-stop shop to host enterprise-wide custom Lightning components that can be reused across apps this increasing productivity like never before.</p>
Lightning Out	<p>Extends Lightning applications to run in any remote web container: Lightning Out is an intuitive way to extend Salesforce capabilities outside of the CRM platform, literally anywhere. Lightning Out enables developers to custom build application with Force.com and allows you to run it wherever your users are, whether Heroku, SharePoint, SAP, or any other external application. This way, users do not need to stay in Salesforce to obtain required information but instead can find directly within the desired third-party application. This flexibility is imperative for organizations where centralized access to information is critical and not limited to Salesforce servers.</p>
App Exchange for Components	<p>Access prebuilt components without building from scratch: Salesforce provides an ecosystem of pre-integrated applications with millions of installs and customer reviews. It is a unified market place where businesses can find ready-to-use components, from third party vendors that are not available out-of-the-box in Salesforce. This way, you don't have to build the functionality from scratch. Just download and reuse the prebuild solutions that are readily available and already tested by the users.</p>
Lightning Bolt	<p>Framework to deploy next-generation communities and portals faster: Based on a reusable template concept, Bolt enables organizations to jumpstart the creation of a new community, next-generation portal or customer-facing website that seamlessly integrates with Salesforce CRM within no time and less investment. Salesforce offers Lightning Templates for Community Cloud for developers to quickly create customized communities for their customers, partners, and employees. Salesforce developers can now leverage Lightning Components to rapidly build Bolt solution with complex business logic, recommendation engines, case management, and even e-commerce, all delivered with easy drag-and-drop development.</p>

Lightning Design System	Salesforce supported patterns and components to build pixel-perfect apps: With a set of UX guidelines and CSS framework, Lightning Design System provides an easy reference for developers to build applications. It's an easy way for developers to make unified experience across enterprise applications so that they are compatible with the Salesforce ecosystem in terms of look and feel. LDS guides your developers to ensure they use the appropriate colors, images, icons, and overall user experience across all the apps.
Lightning Data Services	An intelligent way to access Salesforce data in Lightning Components: Lightning Data Service acts as a data layer for Lightning and is the counterpart to Visualforce standard controller. Earlier, each component within an application made independent calls to the server, even if all components pull from the same record data. This process reduced the performance of the users because of each server call. Salesforce's Lightning Data Service identifies and eliminates requests from same record data. This way users can work offline even after getting disconnected on the server side. The cache data intelligently syncs once the connection is restored.
Locker Service	A powerful security framework to guard against malicious attacks: Any system that's on the internet is vulnerable to constant cyber threats from malicious hackers. The security of the product is a key aspect of trust, and hence every time a new technology surfaces, it's imperative to emphasize the security standards to ensure optimal performance. Lightning Locker uses multiple technologies and techniques to secure the Lightning components. Locker Service provides a governing framework inside Lightning container in order to aid against attacks by constantly monitoring and help prevent components from attacks such as Cross Site Scripting (XSS), unauthorized inter-component communication and data access, access to private APIs, etc. Additionally, Locker Service also encourages JavaScript best practices, client-side API versioning, and custom security policies to suit application needs.

Table 1

BEST PRACTICES TO USE THE SALESFORCE LIGHTNING PLATFORM

The Salesforce Lightning Platform is an excellent set of tools, framework, and guidelines for organizations. But with all the above said, the transition is not immune to mistakes. Hence, it's suggested for developers and admins to adhere to these best practices for a successful transition:

Use Lightning Locker Service: If you have handled data hacking issues in the past, you'd understand the importance of data security for any application. Salesforce Lightning is secure by default via Locker Service – meaning, it safely loads the code and isolates every piece of JavaScript and CSS so that there are no data library conflicts. This way, the application code does not perform unintended or unauthorized malicious activities. To protect your company's valuable resources and for a smooth run of your applications, Solunus recommends using Salesforce's Lightning Command Line Interface (CLI) tool. It helps you to safely import and export data and creates orgs. It aggregates all the tools you need to develop and perform commands against your Salesforce Org.

Leverage Design Resource in Lightning Component Bundle: The main feature of Lightning Components is re-usability – meaning use the same component for different similar business requirements. So, it is essential to design applications by organizing functionality into meaningful components which can be reused across other applications where ever it's required. Use a design resource to control which attributes are exposed to builder tools like the Lightning App Builder, Community Builder, or Flow Builder.

Use Lightning Data Service when possible: Use Lightning Data Service to load, create, edit, or delete a record in your component without the need of using Apex code. LDS handles sharing rules at every field-level to simplify access to Salesforce data thus improving performance and user interface consistency. Whenever it is required, use Lightning Data Service to read and modify Salesforce data in your components because it's simpler than using a server-side Apex controller. Apart from this, Lightning Data Service is good at highly efficient local storage that is shared across all components that use it.

MAKE A MOVE TO LIGHTNING WITH SOLUNUS

Switching from Salesforce Classic to Lightning can make a huge difference in how you run your business. Lightning can be transformative to every area of your business, but it's important to know what to expect within your own business before making the transition to Lightning and how to plan accordingly. That said, transitions can be a little tough on the organization. Solunus is committed to getting you through the Lightning adoption journey and stays with you throughout the rollout to ensure your company stays in good form.

Solunus is well-versed with the Salesforce Lightning platform since its launch in 2015. With the Solunus Lightning Transition, we have already led successful Lightning projects for organizations globally. We help customers to determine when and how to move from Classic to Lightning – what's the right time to transition and what needs to be done to be prepared.

Below are the four phases for a successful transition to Lightning:

Solunus' Methodology to migrate to the Lightning Platform:

Solunus recommends taking a business engagement-centric approach to introducing Lightning.

PHASE 1: ASSESS AND SET GOALS

The objective of this stage is to take stock of your org as it stands today and verify if the features you need are compatible with the Lightning Experience. To simplify this process, Salesforce offers the Salesforce Lightning Migration Assistant - a set of tools for your System Admin to determine if your org is ready for Lightning. After the Salesforce's Lightning Readiness Check, Solunus performs detailed internal audits to chalk out a strategic roadmap with functional and technical recommendations tailored to your business. Solunus' analysis determines which teams will use Lightning Experience

PHASE 2: UNDERSTAND AND PLAN

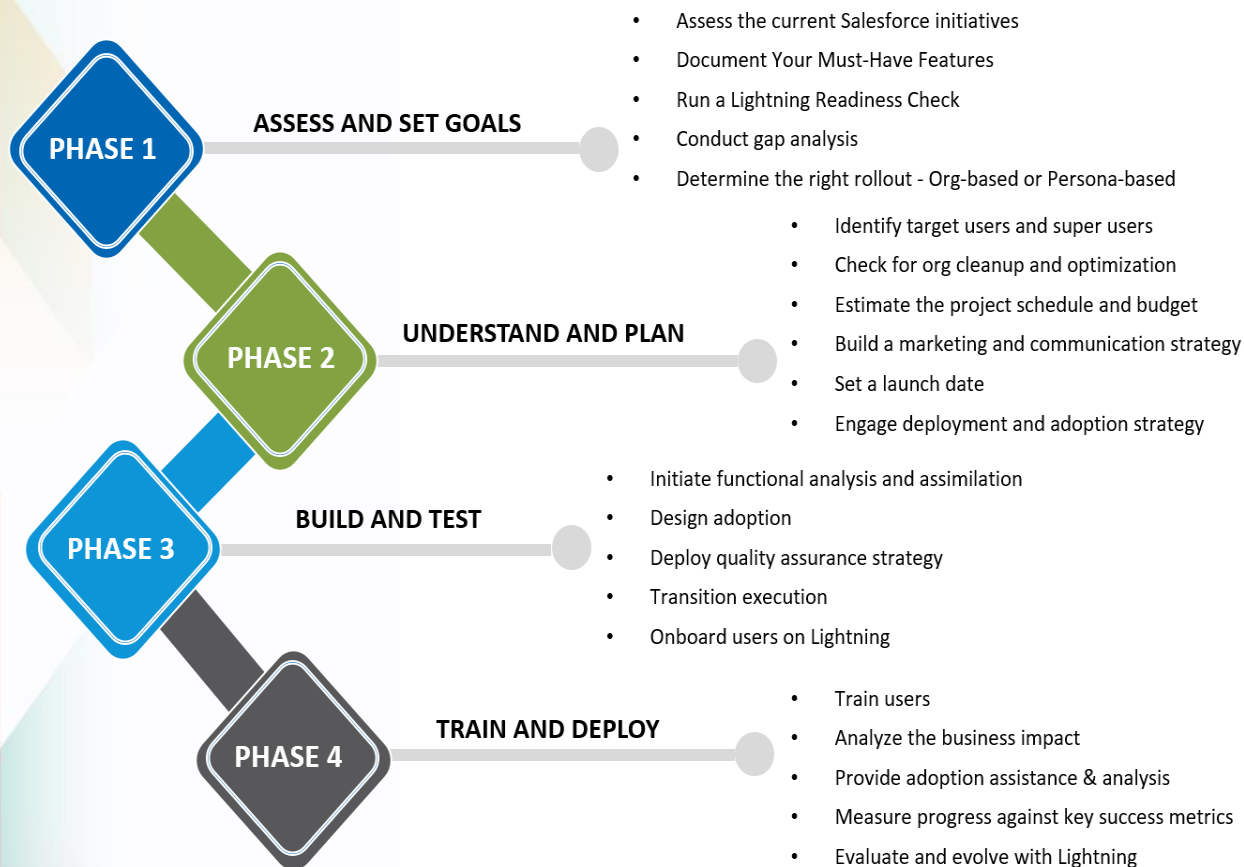
During this stage, the objective is to formulate a roadmap to get your Salesforce org ready. The size of your Org and the number of functional groups involved determine the detail to which you plan the migration. In this stage, Solunus covers resourcing, budgeting, change management, compliance, deployment, and support.

PHASE 3: BUILD AND TEST

This stage is a transitioning phase from Salesforce Classic to Lightning Experience and its associated components. The number of iterations you need actually depends on the size and complexity of your Org. Solunus' Component Library of prebuilt custom components and applications can be deployed directly based on your organization's needs and processes.

PHASE 4: TRAIN AND DEPLOY

This last stage is a complete user adoption via communication, training, and ongoing post-deployment support. Solunus ensures that your users are comfortable with the Lightning Experience changes and don't look for a chance to "Switch to Salesforce Classic."



Conclusion: Investing in Salesforce Lightning today, creates opportunities tomorrow

By the measure of value, the business benefits that Lightning can provide to organizations are specific and unique to each customer. And they can be realized when you get associated with a robust Lightning implementation partner. Because most of the times, Lightning can produce unpredictable benefits that are later realized as additional uses or business opportunities. For instance, the faster onboarding process due to Lightning deployment not only brings enormous savings to the company but also gives access to a wider set of developers. Another example - as the phased Lightning deployments expand to multiple users across the organization, the customer can leverage additional end-user productivity savings. Likewise, the revenue generated from deploying applications faster to the market can be huge, resulting in incremental profit.

Above all, Salesforce has made it clear that their future innovation will be on the Lightning platform. So, if you plan to continue with Salesforce, it becomes inevitable to migrate to Lightning so that you gain access to new features and capabilities like low-code application development, a mobile framework for building applications, and improved dashboards. Partnering with a reliable Salesforce Lightning partner can help you gain access to ongoing innovation. Since 2015, Solonus developed unique solutions on the Lightning platform for its customers from the manufacturing, healthcare, retail, and BFSI industries. We included the new capabilities introduced in the Lightning platform for customers to walk them past the significant hurdles and eased the burden of taking care of the entire project. In case you are sure of migrating to Lightning but are clueless about where to start, [talk to our Lightning Migration expert](#).

FOOTNOTES:

<https://www.pwc.com/us/en/services/consulting/library/consumer-intelligence-series/future-of-customer-experience.html>

<https://www.clearslide.com/view/new/mail?iID=D65JjPkkVp9393FS26SP>

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ABOUT SOLUNUS:

Solunus, a North-American based company, prepares businesses for their next generation customers. Established in 2014, we simplify Salesforce for you to build more meaningful customer relationships. We partner for a win-win arrangement with clear ROI that the client realizes by the end of the engagement. Our 350+ years of industry exposure, project management expertise, and Salesforce experience underpin our position as a problem solver.

Partnering with the dominant CRM provider, we are an integral part of the Salesforce ecosystem and a trusted advisor for several Fortune 1000 companies. Our experienced and innovative consultants deliver absolute quality, consistently. We are CRM Architects, Salesforce Certified Professionals, Project Management experts, Certified Agile Scrum Masters, and our strength lies in how we use the technology to improve overall business performance.



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