Lightning Migration
The time is now...
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Timeline & Trends

• Timeline
  • Lightning Experience (LEX) debuts at DF15
  • Beginning in 2016, new orgs were defaulted to LEX
  • Over many releases, LEX has reached virtual parity with Classic

• Roadmap
  • Little to no R&D funds for Classic
  • Winter ‘17 release included option to disable Classic
  • Internet Explorer 11 support for LEX ended Dec 2017
  • “Classic” configuration tools (i.e. Workflow Rules) will slowly be deprecated
Advantages

User Interface
Path guided compliance
List Views with Charts
Kanban – popular in Agile Scrum
Lightning Components
Unified Experience across devices
Lightning Community Builder
Dashboards with more columns!
Home Page Customizations (Charts, Assistant, News)

ETC…….
Gaps

Documents
Notes & Attachments
Custom Buttons & Links containing javascript or URL parameter hacks
Customizable Forecasts
Recurring Events
Content Libraries
Joined Reports
Printable View Reports
ETC…
Impacts

Not Impacted –
• Data
• Security (OWD, Roles)
• Business Logic (Workflows, Approval Process, Process Builder, Flows, Validation Rules)

Majorly Impacted
• User Interface
• AppExchange products
• Custom Code & Configuration (Visualforce, URL parameter hacks)
• Training materials
• Reports & Dashboards
Migration Assistant

- Learn
  - Migration Assistant
  - Video: Introducing Lightning Experience
  - Trailhead Trail: “Make the Move to Lightning Experience”
- Check Readiness
  - Readiness Report
- Optimize
  - My Domain
  - News
- Social Accounts, Contacts, and Leads
- Notes
- Setup Users
  - Profiles (make LEX an option)
  - Switch Users (force user in to LEX, with an option to revert)
- Free Consultation
- Free Webinar series (Large Group or Small Group)
- Estimate your Rollout Effort
- These are VERY rough estimates - variances +/-
- Things that need your attention
- Use this list as a baseline for your migration plan

These features and customizations need your attention

<table>
<thead>
<tr>
<th>END OR OBJECT</th>
<th>APP</th>
<th>WHEN IS IT COMING TO LIGHTNING EXPERIENCE</th>
<th>USER IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documents</td>
<td>Service, Sync, Portfolio</td>
<td>No plans to develop this feature for Lightning Experience. Instead, migrate to Salesforce Plus to save, share, and collaborate around documents. Included in 22 profiles, assigned to 144 users.</td>
<td></td>
</tr>
<tr>
<td>Attachments</td>
<td>Service, Sync, Portfolio</td>
<td>No plans to develop this feature for Lightning Experience. Instead of creating new attachments, use Salesforce Classic to convert your attachments to enriched notes, which allow you to do the same stuff that you do with attachments in Salesforce Classic, but also let them collaborate on and share attachments even better than before. Learn More. Included in 21 profiles, assigned to 114 users.</td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td>Service, Sync, Portfolio</td>
<td>No plans to develop Classic Notes for Lightning Experience. Instead of creating new notes in Salesforce Classic, convert your classic notes to enhanced notes, which are more versatile than classic notes, and are optimized for Lightning Experience and Salesforce Classic. Learn More. Included in 21 profiles, assigned to 101 users.</td>
<td></td>
</tr>
</tbody>
</table>

Tab, Objects, and Related Lists

These tabs and objects aren’t supported in Lightning Experience.

Users can see these tabs and objects in Lightning Experience, but when users select them, a new browser tab opens in Salesforce Classic.
Resources

Article List
- Admin Blog Post – “Migrating to Lightning Experience from Classic” (Sep 2017, Shell Black)
  - https://admin.salesforce.com/migrating-lightning-experience-classic
- Documentation – “What are the Gaps Between Lightning Experience and Salesforce Classic”
- Documentation – “Compare Lighting Experience and Salesforce Classic”
  - https://help.salesforce.com/articleView?id=lex_aloha_comparison.htm
- Documentation – “Lightning Roadmap”
- Salesforce Blog – Lighting Adoption: It’s as Easy as 1-2-3!” (Brooke Haynes, Admin, Dot Foods)
  - https://www.salesforce.com/blog/2018/02/easy-lightning-adoption.html#JT

Tools
- Magic Mover for Notes & Attachments - https://appexchange.salesforce.com/listingDetail?listingId=a0N3A00000EHAmyUAH
Playbook

• In order to be well prepared with Lightning migrations, plan out your approach.
• Each migration should have it’s own playbook that will outline the steps required to successfully deliver the solution.
• This will include Tasks, tip sheets, communication templates, and web links to support the project.
• The playbook is a checklist and it will evolve as we learn more.
Methodology

We’ll generally follow the Salesforce approach to Lightning migration. Our playbook focusses on Learn and Launch.

**LEARN**
- Educate yourself
- Educate your company
- Review feature comparison charts
- Conduct gap analysis (existing customers)

**LAUNCH**
- Identify and activate super users
- Identify users for pilot (optional)
- Create project schedule
- Identify measures for success
- Create and execute marketing and training strategy
- Customize and test
- Enable Lightning Experience

**ITERATE**
- Evaluate current post-launch state
- Create reports and dashboards
- Conduct business user surveys
- Connect regularly with super users
- Report out to executive sponsor

Source: [http://sforce.co/2p2u4fl](http://sforce.co/2p2u4fl)
<table>
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<th>Task</th>
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<tr>
<td>Identify super users, project champion, and stakeholders</td>
<td>The super users are functional team members who will be your hands on team. The project champion is the internal user who sees the benefits of Lightning and is often an executive. They will be your inside cheerleader. The stakeholders are functional area leads (could overlap with other roles).</td>
</tr>
<tr>
<td>Educate Company about Lightning</td>
<td>Demo for key stakeholders, share with leadership team, direct people to Trailhead and share feature comparisons. Share this resource - <a href="http://sforce.co/2oVg3Qz">http://sforce.co/2oVg3Qz</a></td>
</tr>
<tr>
<td>Determine project goals</td>
<td>With your stakeholders, determine the measures for a successful migration. Take a before snapshot report to show progress.</td>
</tr>
<tr>
<td>Run Lightning Readiness report</td>
<td>Run readiness report in Production or freshly refreshed Sandbox</td>
</tr>
<tr>
<td>Gap Analysis</td>
<td>A full understanding of what features are in use vs what is available is key to a successful launch. The Lightning Readiness report will point out the main gaps, but may not give the full picture. Refer to this feature gap link in Salesforce help for most recent list <a href="http://sforce.co/2nTWsCI">http://sforce.co/2nTWsCI</a></td>
</tr>
<tr>
<td>External Users in Scope?</td>
<td>If you have a community, decide on whether to migrate internal users first then external or do everything at once.</td>
</tr>
<tr>
<td>Task</td>
<td>Notes</td>
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<td>----------------------------------------------------------------------</td>
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<tr>
<td>Review installed apps</td>
<td>Determine which are LEX ready and which work even if not technically &quot;ready&quot;</td>
</tr>
<tr>
<td>Review buttons and links</td>
<td>Make determination about which can be recreated with Actions or other dev. This will likely require a conversation with customer.</td>
</tr>
<tr>
<td>Review email templates</td>
<td>Determine course of action for custom templates, do one or two to demonstrate. (note - Summer 17 will introduce Classic Templates/letterhead support but unclear what form)</td>
</tr>
<tr>
<td>Create Matrix of different user roles/personas and limitations and gaps</td>
<td>Strategize the ways to alleviate/mitigate gaps. Note - For some teams it may be best staying in Classic until gaps are addressed. See sample gap template: <a href="https://8cloud.quip.com/apKMAy9ofMzi">https://8cloud.quip.com/apKMAy9ofMzi</a></td>
</tr>
<tr>
<td>Interview stakeholders</td>
<td>Based on learning from rows above, have a conversation about your findings. Think of gaps and differences in terms of opportunity to reconsider process, not just find a way to mimic Classic</td>
</tr>
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<tr>
<td>Create internal marketing plan</td>
<td>In order to sell the company on the features of Lightning, internal marketing is a great idea. This can be a series of scheduled emails or chatter posts. Work with champion to craft this strategy.</td>
</tr>
<tr>
<td>Create project schedule with milestones and dates</td>
<td>Use the Project plan sample template</td>
</tr>
<tr>
<td>Develop training plan</td>
<td>Who are you training? Is it live in person or remote? Is this train the trainer or end-user training? Prepare a Trailmix for your users.</td>
</tr>
<tr>
<td>Create a Chatter group for project team communication and collaboration</td>
<td></td>
</tr>
<tr>
<td>Create a Chatter group for business users to ask questions</td>
<td>Prefill the group with information and relevant posts about what to expect.</td>
</tr>
<tr>
<td>Install Adoption Tracker app</td>
<td>To help measure adoption, install this free Salesforce app in Production (before Salesforce refresh) <a href="http://sforce.co/2p5azTx">http://sforce.co/2p5azTx</a></td>
</tr>
<tr>
<td>Refresh full or partial data sandbox</td>
<td>This will be where testing and UI changes will take place</td>
</tr>
<tr>
<td>Consider Branding</td>
<td>Lightning allows for customer color defaults, logos, background images, etc.</td>
</tr>
<tr>
<td>Task</td>
<td>Notes</td>
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</tr>
<tr>
<td>Discuss Migrate Attachments to Files</td>
<td>Given the Salesforce plan to turn Attachments read only w/Summer 18 release. Determine course of action, discuss options. Discuss Files first training.</td>
</tr>
<tr>
<td>Address custom buttons</td>
<td>Use Actions, Lightning components, Apex, Process builder, etc.</td>
</tr>
<tr>
<td>Create/update Lightning Pages</td>
<td>Try to make Page UI consistent across objects where possible. For example, place Activity and Chatter on the right of page and Related and Details in the center. Some objects may require different layouts based on use patterns. Understand what are the most heavily relied upon objects.</td>
</tr>
<tr>
<td>Activate super users</td>
<td>User Tabs to organize detail/related lists. Make record detail the default. Be consistent with Compact Layouts that display in the header.</td>
</tr>
<tr>
<td>Training</td>
<td>Provide super users a test plan to touch all relevant areas of Lightning.</td>
</tr>
<tr>
<td></td>
<td>Execute your training plan.</td>
</tr>
</tbody>
</table>
Example: Home Page and Lightning Page creation
Demo – Path and Kanban
At the end of a migration we will want to give a good sense of what is next. How do we maintain the momentum and drive adoption?

- Measure adoption
  - Reports
  - Dashboards
- Roadmap for improvements or larger Lightning development projects (perhaps the parking lot items captured during migration)
- Best practices for maintaining excitement after launch
  - Regular check-ins with business users
  - Bi-weekly training/Q&A sessions
Summation / Q&A

• Connect with others
• Ask questions
• Share ideas
• Learn, learn, learn (Trailhead)
• Plan, Do, Check, Adjust

• Questions?

Can’t do it alone? We can help!
http://www.eightcloud.com/