The Secret to Lightning Experience Adoption: Engage Your Users

Three tips to boosting your Lightning adoption

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A composite organization deploying Lightning saw up to a 25% overall productivity improvement.

Total Economic Impact™of Salesforce Lightning – Forrester Consulting
May 2018

Admins Wear Many Hats

We're asked to do a lot

Engage Your Users!

Engagement is key to your success

There are three areas we will focus on:

1. Focus on Role Level Enhancements
   - How will Lightning Experience make their lives easier?
2. Build a Communication Plan
   - What communication do they need to feel prepared?
3. Train and Support Your Users
   - How do we empower our users to use Lightning Experience?

#1 - Role Level Enhancements

Tailored For Roles

Streamline and Optimize for Your User's Roles

Lightning Experience allows for deep customization

- Page Layouts, Apps, Navigation, Components, etc.

Identify pain points and areas of inefficiency

- Ask questions, but also set aside time to shadow
- With a roadmap of improvements, we can begin customizing our org
- These also become the core of our messaging (used in point #2)

Real-World Interviews

How interviews and shadowing identify enhancements

Andy the Account Executive

- Mentioned cumbersome steps in sales process
- Primary concern is progressing a deal quickly and easily
- Often has 10-15 active deals, needs to easily manage

Diana the Director

- Not a heavy Salesforce user
- Focused primarily on metrics, reports, and dashboards
- Manages large teams, needs to accomplish tasks quickly

Christi the Customer Support Rep

- Case layout not optimized for their business process
- Entering case time involved many clicks and pages
- Not aware of Service console, always had 20+ tabs open

Scenario – Customer Support

How to tailor Lightning Experience for your roles

Christi the CSR

- Case layout not optimized for their business process
- Entering case time involved many clicks and pages
- Not aware of Service console, always had 20+ tabs open

#1 – Move to Service Console

- Easier navigation of related records
- No longer necessary to have multiple tabs open

#2 – Case Time Quick Action

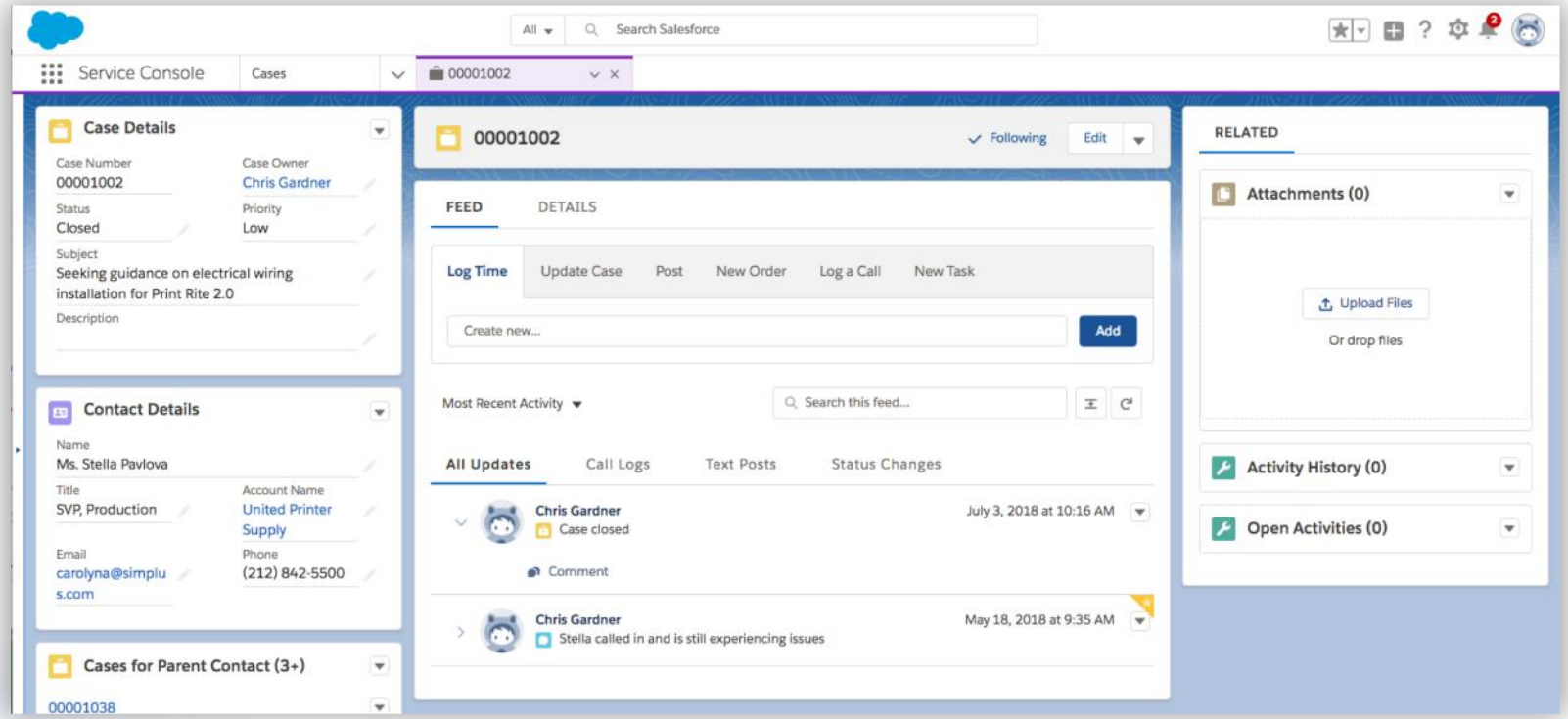
- Quick action directly on page layout to log time
- Went from 25s per entry to 4s – almost 6x faster

#3 – Faster Onboarding Time

- More intuitive features like Kanban view made it faster to onboard new CSRs

What the App Looked Like

The outcome of our role-specific changes



Service Console App

- Quick Action to log time from case page
- Service console removed need for multiple tabs
- Easier to update case comments and status
- Fewer related lists and fields

How Does This Engage Our Users?

- Our effort to understand our users shows our dedication to their success.
- We learn how to help them be productive.
- We become a team working towards a common goal.

#2 - Building a Communication Plan

Communicating Change

Change can be difficult, reduce the impact with communication

Don’t let anyone be taken by surprise

- Get executive stakeholder alignment
- Prepare communication early, create a calendar
- OVER-Communicate the changes

Reach your users where they spend time

- Chatter, email, chat, Slack, company meetings,… bulletin board?

Communication Calendar

Keep everyone informed

Communication	Method	Timing
Explanation from Executive *(Team or Executive Sponsor)*	Email	6 Weeks Before Launch
Create Chatter Group, Invite Users	Chatter	6 Weeks Before Launch
Identify Power Users, Schedule Interviews and Shadowing	Email, Chatter	6 Weeks Before Launch
Begin Org Changes in Sandbox		5 Weeks Before Launch
Reminder Email from Executive Sponsor	Email	4 Weeks Before Launch
Schedule Training Session	Email, Chatter	4 Weeks Before Launch
UAT with Power Users		3 Weeks Before Launch
Final Reminder from Executive Sponsor	Email	2 Weeks Before Launch
Begin Training Sessions	Video Conference	2 Week Before Launch
Message from CEO	Email, Company Meeting	1-3 Days Before Launch
LAUNCH PARTY!		
Follow Up Trainings, Office Hours, Chatter Support		Post Launch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“It’s not what you say, it’s how you say it that really matters.”
Proverb

Compare These Statements

“We’re moving our org to the new Lightning Experience, so there will be a bunch of changes coming. Stay tuned for more information.”

vs.

“As a company, we have decided to migrate to Lightning Experience. This is going to give us the ability to make our jobs easier and help you be more productive.”

Messaging Makes a Difference

Make sure your users understand the W's

People should understand the 5 W's

- What – What change(s) are coming?
- Why – Why is a change necessary/desired?
- When – When should I expect the change?
- Who – Who will be affected, and who is supporting?
- hoW – How will this change my day-to-day?

Use the intelligence we gathered previously

- We can direct our messaging to the pain points we identified earlier

Messaging to Our Roles

How we can message benefits to our teams

Andy the Account Executive

- ”We’ve created a Kanban view for your opportunities to make it easier to monitor and manage deals”
- “We’ve updated X step in the sales process with this quick action”

Diana the Director

- ”With these Lightning dashboards, you have greater visibility into your KPIs”
- ”We’ve customized your navigation to easily get to your most important items”

Christi the Customer Support Rep

- “With Service Console, you can manage cases easily, no more need to have 20 tabs open”
- “We’ve created a quick action to log case time directly from a case”

How Does This Engage Our Users?

- People understand the 5 W’s of the change.
- We can message the change as a way to make their lives easier.
- We can gain the trust and confidence of our teams.

#3 - Training & Support

Training Our Teams

We must provide trainings to make our users comfortable

Change is difficult, even when it is progress

- Muscle memory and habits take time to reprogram
- Prove the value of changing by offering increased benefits

Tailor your trainings to the roles

- Turn your early interviews into training scripts
- Focus on important functions first, benefits second

Scenario – Training Stubborn Users

Training veteran Salesforce users

Users of Salesforce Classic for 10+ years

- Comfortable and familiar with Classic interface
- Lots of muscle memory
- Learning a new system can cause delays

Problem #1 – Habits and Familiarity

- **Solution** – Map common hacks to new features and layouts
  - You can use favorites and recently viewed records to navigate faster
  - That button and list view are now at the top of the page instead of the bottom

Problem #2 – Learning Curve

- **Solution** – Executive alignment from top down, with clear messaging from all parties

Problem #3 – Very Busy Schedules

- **Solution** – Conduct multiple training sessions, record trainings for future users

Training Best Practices

How to craft your training for roles

Introduction – 5 min

- Focus on the Why

Walkthrough of Lightning Experience – 10 min

- Show general Lightning features (navigation, search, favorites, etc.)

Key Role-Specific Functions – 25 min

- Show custom items (apps, Lightning pages, Lightning components, etc.)
- Perform job functions (opportunity from new to closed, case resolution process, etc.)

Q&A – 10 min

- Make sure to allow time for questions and review of topics

Support Best Practices

How to support your users in their journey to adoption

Encourage Questions

- Make sure users have a place to ask questions, and that they are encouraged to use it

Provide Recorded Trainings and Materials

- Give users access to recorded trainings, and any training materials

Leverage Trailhead

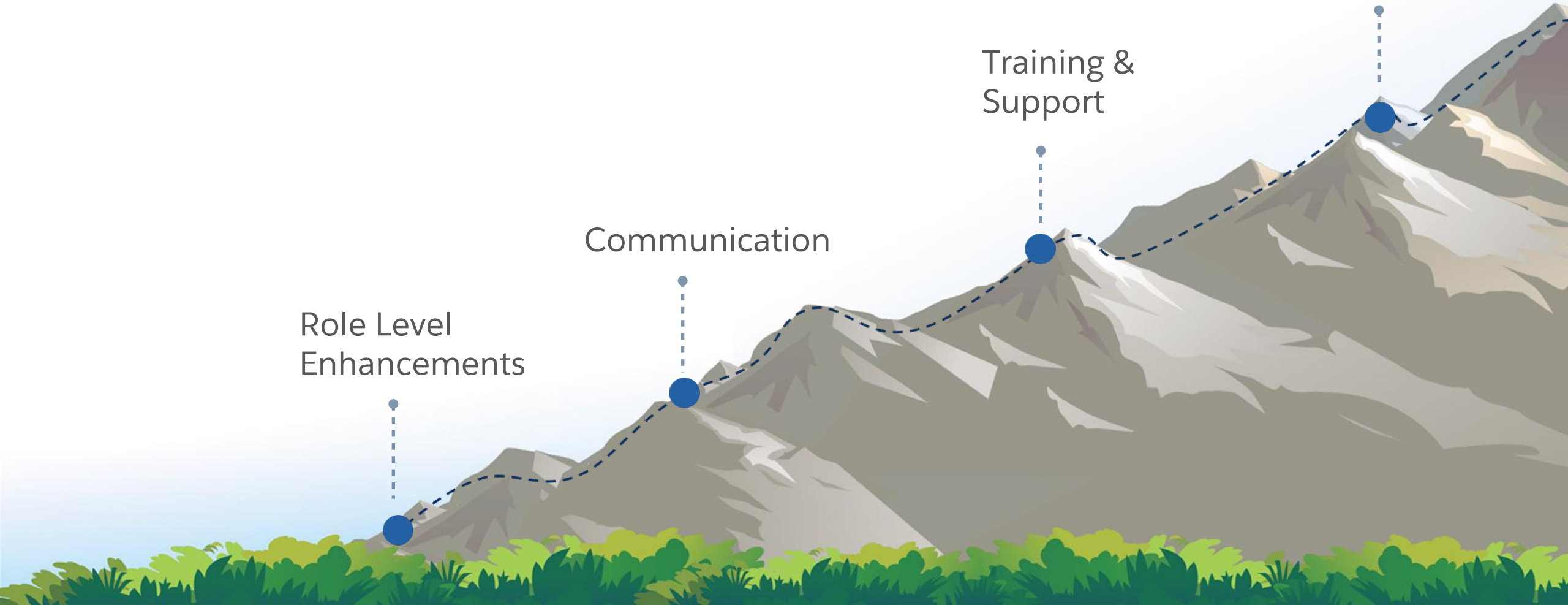
- Encourage your users to learn more on Trailhead
- Create a custom Trailmix for your roles

How Does This Engage Our Users?

- Training sessions offer us the chance to get people excited about the changes.
- We are able to showcase refined processes and improved experiences.
- We gain trust from our users as we provide knowledge and support.

Our Journey to Adoption

How we get to high adoption rates



Enablement without adoption is like a concert without an audience.

THANK YOU