

Welcome! We evaluated your Salesforce implementation and prepared this personalized report to help you start planning your rollout.

What's in This Report?

Rolling out Lightning Experience to your users requires thoughtful planning. To get started, this report gives you a sweeping view of where you stand with Lightning Experience. We include guidance on which users are most prepared to help you test the new interface, and recommendations on how to tweak some key features and customizations that need your attention. For some users, we offer estimates about how your rollout might go. That way, you're prepared to answer hard-hitting questions about the business value of moving to Lightning Experience.

To see which features are evaluated, see What Does the Readiness Check Evaluate? in Salesforce Help.



Why Move to Lightning Experience?

Salesforce surveyed customers who already made the switch to Lightning Experience to understand the impact on their company. We compared your Salesforce usage with the average return on investment reported by Salesforce customers during the study.

Based on how you're using Salesforce today, we estimate that you could...

Calculation

Increase your sales win rates by 21%



4 more deals per year Your closed-won opportunities in the last year X 21% average increase in closed deals, according to surveyed customers

Increase your sales team's lead conversion rate by 22%



7 more opportunities per year

Your total created opportunities in the last year X 22% average increase in created opportunities, according to surveyed customers

Increase your sales team's productivity and collaboration by up to 25%

On average, customers who made the switch saw a 3-25% increase in end user user productivity, according to the Forrester Consulting study, The Total Economic Impact™ of Salesforce Lightning.

Keep in mind that results can vary by company and business objective. To calculate your own company's business impact from making the move to Lightning Experience, try the Lightning Experience Business Assessment now. Additionally, you can read the Forrester Lightning TEI study, which shows a 341% ROI for a composite organization that made the switch to Lightning Experience.

O Your Rollout Effort

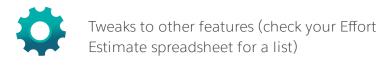
To estimate your effort, we established an average for the number of hours that specific Lightning Experience transition tasks have taken. Then we compared our averages with your report results.

The estimates assume that you've taken steps to educate yourself about Lightning Experience and how to tackle required transition tasks. The estimates don't include time for that preparatory work. To understand what we assume that you know, we've supplied the Estimated Effort spreadsheet, which includes calculation details and a list of the Lightning Experience resources for your team to review before you start your rollout.

The estimates also assume that you'll address all recommendations in this report. For many customers, the Readiness Check unearths features and customizations that you no longer use, so there's no need to move them into Lightning Experience. Look at that: You've only just begun and you're already ticking things off the to-do list! Plus, it's a great opportunity to toss old customization relics. With Lightning Experience, a fresh start awaits you.

AMARIAN STORY

Feature	Estimated hours spent on Salesforce development, configuration, and administration	Estimated hours spent on change management, user testing, and user training
Visualforce pages	For estimates, run the the Visualforce Pages	Visualforce Check from section of this report.
Custom buttons and links – URLs	1	1
AppExchange packages and third-party Computer-Telephony Integration (CTI)	2	1





Let us know how you feel about these estimates. Post your feedback to the Lightning Now group in the Trailblazer Community with the hashtag #readinessreport.

? How Do I Use This Report?

To help you stay on task, here's a checklist that shows you when to reference your report for guidance during your rollout.

The list includes best practices learned from our experience and the experience of thousands of customers who have already fully transitioned to Lightning Experience. Because your rollout is an iterative process, you'll visit some milestones multiple times until you move all of your users into the new interface. Along the way, keep in mind that the Readiness Report is a guide; there's no need to fix everything or follow every single step. If you need help prioritizing fixes, stay tuned for guidance about registering for a chat with one of our experts.

1 Review your Readiness Report

To get some context as you start planning your rollout, review this report, the first draft of your gap analysis.

2 Get some support

To get feedback on your report and learn how to use it to start developing your rollout plan, bring your questions to a free, small-group consultation with a Lightning Experience expert. Or for more support, head to AppExchange and hire one of our Lightning-accredited consultants.

Register for a consultation > Find a consultant >

3 Engage your stakeholders

To get buy-in from important stakeholders and executives at your company, demonstrate the business value of Lightning Experience. Present the impact and effort calculations we've provided at the beginning of this report.

4 Identify your Lighting Experience champion

In this report, we point you to user profiles that include the users who are most ready for Lightning Experience. Select one of these users to be your Lightning Experience champion and enlist them to test beloved Salesforce Classic features in Lightning Experience. Champions are your Salesforce super-users; those who offer recommendations on ways to make it better. If no one comes to mind, choose a champion who is vocal about improving your business processes, or is the first to adopt new technologies.

See which users are ready >



5 Enable Lightning Experience for your champion

Turn on Lightning Experience and give your champion access to the new interface. Read up on what enabling Lightning Experience entails before you flip the switch. For example, standard profile users automatically get access to Lightning Experience when it's enabled, so move them to a custom profile until you're ready for them to use the new interface.

Enable Lightning Experience >

6 Let your champion fly

Spend a little time showing your champion around the place. Demo Lightning Experience in person so you can respond to questions quickly. Then, have your champion do their job in Lightning Experience for a week. What's working well out-of-the-box? What's not working so well? Ask your champion to record their experiences and recommendations on how to better meet their business needs.

7 Get Feedback from your champion

Talk to your champion about which features aren't ready for showtime yet. Make a list of things to fix. Decide which fixes are business-stopping, and which are nice-to-have. You can leave secondary items for future iterations.

8 Create your rollout plan

Develop a plan and schedule that prioritizes your champion's feedback and the technical changes identified by this report. If you need help, check out the Craft and Execute Your Rollout Strategy module in the Lightning Experience Rollout Trail.

Check out Trailhead >

9 Prepare for phase 1 of your rollout

First, fix the issues that you've prioritized. Then, set up one key Lighting Experience feature, like Path, Duplicate Management, or Lead Conversion. Pick a feature that will make a big impact to your champion's workflow to demonstrate how Lightning Experience can redefine the way they work.

Learn about features >





10 Launch phase 1 of your rollout

Enable the rest of the users that are in the same profile as your champion. Have your champion demo Lightning Experience and train the others on how to complete tasks that are integral to their daily work. When appropriate, champions can point out the ways in which the new interface makes their jobs easier. Observe the new users and get their feedback, too.

Revisit which users are ready >

When you finish phase 1 of your rollout, start the next phase. Run the Readiness Check again and start over with step 1. This time, roll out to the next most ready profile that's identified in the updated report. And so on.

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Was this helpful?







Which Users Are Ready?

You can roll out Lightning Experience to a specific set of users using profiles or permission sets. Based on the features and customizations that we evaluated, here's where users from each profile stand with Lightning Experience. This evaluation is based on the number of features that require your attention for each profile and the impact that particular feature gaps have on users. It's best to keep members of a functional team on the same user experience.

Not Quite Ready

Of the features and customizations we checked, these profiles have access to features that require more attention before rolling out Lightning Experience. To get your users ready, make the modifications we suggest in the report and run Readiness Check again.

Profile Name	Number of Users	Features That Require Attention
SalesforcePlatformUserStudent	1	Salesforce Console, Opportunity Partners, Account Partners
SalesforcePlatformUserProfessor	3	Opportunity Partners, Account Partners
System Administrator	1	Salesforce Console, Opportunity Partners, Account Partners



Planning Your Transition

Here's a high-level view of where these features and customizations stand with Lightning Experience. Use this info to create the first draft of your gap analysis. To get a closer look, click the link for each feature or customization. We'll send you to the relevant report section with recommendations for specific changes. But remember: You're the Salesforce expert at your company. Leverage the usage data in each section to decide whether our recommendations are worth your effort. For example, if the report identifies that custom JavaScript buttons require a thoughtful rollout, but no one is using them, cross that feature off your gap analysis.

Ready	! Requires Some Review	A Requires Your Attention	Requires a Thoughtful Rollout
Third-Party Computer- Telephony Integration (CTI)	Custom Buttons and Links URLs	- Salesforce Console	Tabs, Objects, and Related Lists
Custom Buttons and Links- JavaScript	AppExchange Packages	Solutions	
Home Page and Sidebar Components	Activities Setup	Data.com	
Reports and Dashboards Sharing	Hard-coded URLs		
Visualforce Email Templates	Sharing Buttons		
Salesforce Knowledge	Web Browsers		
Visualforce Pages	My Domain		
Lookup Filters	Cases		
Lookup Fields			

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Omni-Channel	
Entitlements	
Live Agent	
S-Controls	
SOS	

Readiness Details

Now let's dig in to the details. Here you get recommendations about how to tweak features and customizations that need your attention. Review the usage data so you know who's using these features and how often. Use these details to develop your rollout plan. Ask yourself: "Which users have the fewest obstacles and can start working in the new interface easily?" or "Which features can I ignore because they're not in use?" Or even, "Which features require a thoughtful rollout, but only affect a handful of users?"



Tabs, 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.

Tab or Object	Арр	When is it Coming to Lightning Experience?	User Impact 🗓
Documents	Analytics Studio	! No plans to develop this feature for Lightning Experience. Instead, migrate to Salesforce Files to save, share, and collaborate around documents.	Included in 13 profiles, assigned to 5 users

These related lists aren't supported, which means users can't see them in Lightning Experience.

Related List	Location	When is it Coming to Lightning Experience?	User Impact 🕕
Account Partners	Account (Marketing) Layout, Account (Sales) Layout, Account (Support) Layout, Account Layout	Stay tuned. Lightning didn't strike yet.	Included in 13 profiles, assigned to 5 users
Opportunity Partners	Opportunity (Marketing) Layout, Opportunity (Sales) Layout, Opportunity (Support) Layout, Opportunity Layout	Stay tuned. Lightning didn't strike yet.	Included in 13 profiles, assigned to 5 users

What should you do?

Decide which users can work without these tabs, objects, and related lists, and move those users to Lightning Experience. Learn More >

Custom Buttons and Links-URLs

These custom buttons and links point to other pages in your Salesforce domain (also known as internal URLs).

Users can see these buttons and links in Lightning Experience, but the buttons and links might not work as expected.

URL Button	Layouts Containing the Button	User Impact 🚺
ViewCampaignInfluenceReport	Campaign Layout	Included in 13 profiles, assigned to 5 users
UpsellCrosssellOpportunity	Case Layout , Case (Support) Layout	Included in 11 profiles, assigned to 5 users

What should you do?

Test these buttons and links to see whether they work as expected. To run your test, preview Lightning Experience from the Migration Assistant in Salesforce Setup. If you notice problems, update your custom URL buttons and links to ones that are supported in Lightning Experience.

In the Summer '18 release, Salesforce changed the URL format used by Lightning Experience standard and console apps and the Salesforce mobile app. We recommend that you update your custom URL buttons and links to use the new URL format.

To learn more, check out our resources.



- Constructing Effective Custom URL Buttons and Links >
- Dynamically Filter Reports Using URL Parameters >
- Filter Reports via URL Parameters in Lightning Experience >
- FAQ for the New URL Format for Lightning Experience and Salesforce Mobile App >

Activities Setup

Activities such as tasks, events, emails, and logged calls, are available in Lightning Experience with some limitations, but also with major improvements over their Salesforce Classic counterparts. This section describes activities that require you to set up features or verify your existing set up. And to make sure that you get the most out of Lightning Experience, we also suggest optional customizations. These extra customization steps give your users a seamless transition to the new interface and a more productive experience.

What should you do?

Set up these features for each type of activity.

Tasks

- 1. Enable recurring tasks, and add them to task page layouts >
- 2. Enable reminders, and add them to task page layouts >
- 3. Add the new task action to the Mobile and Lightning Experience Actions on page layouts for any object where users are likely to create tasks. For example, users might want to create tasks from an opportunity, because they want to create a to-do list to move the opportunity to the next stage.

Events

- 1. Add the Repeating option (beta in Winter '19) to event page layouts to let reps create event series.
- 2. Enable reminders, and add them to page layouts >
- 3. Set up the attendees field, and add it to page layouts. To set up attendees, you must set up Lightning Sync, which requires support from your Microsoft or Google administrator.
- 4. Add the new event action to the Mobile and Lightning Experience Actions on page layouts for any object where users are likely to create events. For example, users might want to set up a meeting with a contact after they check the contact's time zone or address.

Emails

1. Add the email action to the Mobile and Lightning Experience Actions on page layouts for any object where users are likely to send emails. For example, users might want to send an email from an opportunity, after checking the status of an opportunity in Path.

- 2. To let users send emails that have a similar look and feel to emails sent from their favorite email applications, verify that Enhanced Email is enabled >
- 3. If your users have Gmail™ or Microsoft® Office 365®, to let users send emails from those accounts without leaving Salesforce, set up Send Email from Salesforce >
- 4. To let users send individual emails to a list of recipients, verify from the users' profile that they're allowed to send list emails.

Logged Calls

Add the log a call action to the Mobile and Lightning Experience Actions on page layouts for any object where users are likely to log calls. For example, following a fruitful conversation about a prospective purchase, users might want to log a call from their lead or contact records.

Optimize Activities Setup

The Open Activities and Activity History related lists don't exist in Lightning Experience. Instead, users manage their activities with the activity timeline. On each record, the activity timeline tracks past and pending tasks, meetings, emails, and calls in one consolidated, chronological list.

To make the most of your users' experience, we recommend that you tailor the activity timeline for your business case. Then, before you roll out your pilot, train your users how to manage tasks, events, and email.

If you want an easy way to move your Salesforce Classic actions and buttons into Lightning Experience, check out the Lightning Experience Configuration Converter.

- Use Tasks to Boost Sales Productivity >
- Lightning Sync >
- Use Enhanced Email for More Email Functionality >
- Considerations for Setting Up Enhanced Email >
- Lightning Experience Configuration Converter >



Salesforce Console

You're using Salesforce Console for Sales or Service. Many console features are supported in Lightning Experience, but some work differently than their Salesforce Classic counterparts. Other console features aren't available in Lightning Experience yet. To make console features available to your users in Lightning Experience, customize the out-of-the-box Sales Console and Service Console apps in Lightning Experience.

Let's review some of the console features you're using and what you can do to set up similar functionality in Lightning Experience.

Impacts Specific Console Apps

Feature	App Label	When Is It Coming to Lightning Experience?
Multi-monitor support	standardServiceConsole	⚠ Stay tuned. Lightning didn't strike yet.
Navigation rules		Use the App Manager to add navigation rules to your Lightning console app.

What should you do?

For supported features, you can set up users with Salesforce Console functionality similar to what they were using in Salesforce Classic by customizing the Sales Console or Service Console apps in Lightning Experience with the workarounds we suggest.

For unsupported features, decide which users can work without these items, and move those users to Lightning Experience. Learn More >



Resources

- Salesforce Console in Lightning Experience >
- Lightning Sales Console >
- Lightning Service Console >
- Service Cloud Basics >

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Solutions

You're using Solutions to resolve your customer cases. There are no plans to develop this feature for Lightning Experience. But don't worry. We offer recommendations on how you can proceed with Lightning Experience.

User Impact 1

✓ Included in 10 profiles, assigned to 2 users.

What should you do?

Consider transitioning your users to Lightning Knowledge, which helps your users find answers fast. Before transitioning to Lightning Knowledge, get familiar with the Lightning Knowledge limitations so that you're clear on which features from Salesforce Knowledge have not yet made it to Lightning Experience. Before you get started, it's important to know that after you enable Lightning Knowledge, you can't disable it. Consider your users' needs, and decide whether they're ready to transition to Lightning Knowledge. When you're ready, test in a sandbox or trial org before you enable the feature in production.



AppExchange Packages

We support AppExchange packages in Lightning Experience, but it's up to the publisher to release a version that supports Lightning Experience. If a package doesn't support Lightning Experience, the buttons, links, and Visualforce pages in the package might not work in Lightning Experience or be visible to users.

You've installed these AppExchange packages. Continue reading to interpret the status of each and to learn what to do to get them ready for Lightning Experience.

Status	Version	Publisher	Namespace
•	4.30	Informatica Corp	INFA
!	1.7	Salesforce.com	sf_com_apps
•	1.80	Rocket Science Group LLC	MC4SF

What should you do?

First, check the layouts that these AppExchange packages are referenced from, and confirm that the packages are actively in use. For in-use AppExchange packages, take action based on the status we've assigned to each.

- Packages with the

 status are ready for Lightning Experience. If you're not sure whether the app is supported for Lightning Experience, contact the publisher.
- Packages with the ♥ status and an asterisk (*) have one or more Lightning Experience-supported versions.
- Packages with the ! status might be ready for Lightning Experience, but require a manual check from you. If you're not sure whether the app is supported for Lightning Experience, contact the publisher.
- Packages with the Astatus aren't ready for Lightning Experience. If they aren't working, contact the publisher for a recommended workaround.

When you're able to identify groups of users who are ready to work with your apps or can work around unsupported apps, move those users to Lightning Experience. Learn More >

Resources

• Salesforce AppExchange >



My Domain

You haven't enabled My Domain yet.

What's My Domain, and Why Should I Use It?

With My Domain, you create a unique URL to replace the original URL that Salesforce assigned to you. For example, you replace an assigned URL, like https://yourinstance.salesforce.com, with the chosen domain name, https://somethingcool.my.salesforce.com. Enabling My Domain lets you use Lightning App Builder or standalone apps to build custom Lightning components on tabs or Lightning Pages. It brings your company's brand into Salesforce.

What should you do?

Enable My Domain and start taking advantage of more awesome Lightning Experience features. Next, check the Hard-coded URLs section of this report. Certain URL references might not work as expected. You may need to replace hard-coded references to your originally assigned URL with references to your new unique URL.

- My Domain URL Changes >
- Automating the Update of Hard-Coded References >
- Guidelines and Best Practices for Implementing My Domain >
- Best Practices for URLs in Apex >



Hard-coded URLs

Here are some places where your Salesforce instance includes hard-coded references to your originally assigned URL. Certain URL references might not work as expected if you use My Domain in Lightning Experience. We didn't check for hard-coded URLs in package and feature integrations, workflows, Chatter posts, content URLs, Salesforce Documents, and static content.

URL Type	URL Location	Reference in Salesforce
Custom Buttons and Links - URLs	UpsellCrosssellOpportunity	https://na1.salesforce.com/opp/oppedit.jsp?accid= {!Account_ID}&opp3=Up-sell+/+Cross- sell&opp5=Existing+Customer&opp6=Customer+Support

What should you do?

If you haven't already, enable My Domain. Then, ask your Salesforce developer to revise any URL references. Have your developer review the resources below to learn best practices for revising or replacing hard-coded references to your originally assigned URL with references to your new unique URL.

- My Domain URL Changes >
- Automating the Update of Hard-Coded References >
- Guidelines and Best Practices for Implementing My Domain >
- Best Practices for URLs in Apex >



Sharing Buttons

These sharing buttons aren't supported in Lightning Experience, which means that your users can't see them. But don't worry. We can suggest some workarounds.

Object	Button Location	User Impact 1
SUStudent_Masterc	SUStudentMaster Layout	Included in 13 profiles, assigned to 5 users
SUStudent_Masterc	SUStudentMaster Non-CSE IT Layout	Included in 3 profiles, assigned to 5 users
SUStudent_Masterc	SUStudentMaster CSE IT Layout	Included in 3 profiles, assigned to 5 users

What should you do?

First consider if you even need manual sharing buttons. In most cases, there's other ways to share records. Consider using sharing rules, ownership and roles, queues, and teams. You could also setup manual sharing to a user or a group with Apex or the SOAP API. For users who require these buttons, you can recreate sharing buttons using the AppExchange component Lightning Sharing from Salesforce Labs.

- Sharing Settings >
- Lightning Alternatives to JavaScript Buttons >

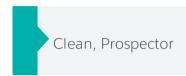


- Navigation and Actions: What's Not in Lightning Experience >
- Sharing a Record Using Apex >



A Data.com

Your users are working with these Data.com features. Some Data.com features are different in Lightning Experience, and some are unavailable. You should also know that Data.com Clean and Data.com Prospector products are being retired on July 31, 2020.



What should you do?

Determine which of your users work with Data.com features that are different in Lightning Experience. Train users to work with the new features.

Determine which of your users work with Data.com features that aren't available in Lightning Experience. You can move users who don't use those features to Lightning Experience now. Stay tuned for alternative solutions.

Resources

Compare Data.com Features in Lightning Experience and Salesforce Classic >



Web Browsers

Lightning Experience is supported in specific browsers. These browsers give users the most stability and security when they work in Salesforce. We looked at which browsers your users are working from. We also noted which users are working from Microsoft® Internet Explorer® 11, which is no longer supported for Lightning Experience. To continue using Internet Explorer 11, opt in to extended support. Unless you opt in to extended support, users on Internet Explorer 11 are automatically redirected to Salesforce Classic.

Number of users accessing Salesforce from an unsupported browser last month: 1

Of those users, number accessing Salesforce from Internet Explorer 11 last month: 1

Here's a list of your users on unsupported browsers.

User	User Name	Using Internet Explorer 11?
Jeremy Williams	moonjemsinvest@gmail.com	Yes

What should you do?

Move these users to Lightning Experience supported browsers. Internet Explorer 11 users have to move to a supported browser unless you opt-in to extended support soon.



Stay Engaged with Lightning Experience

We're constantly improving Lightning Experience and Readiness Check to make your Lightning Experience transition as seamless as possible. To get up-to-date details on where you stand, rerun Readiness Check periodically. Or check out our newly-released features in Salesforce Release Notes and Lightning Experience Basics.

Let us know how you feel about the Readiness Report. Post your feedback to the Lightning Now group in the Trailblazer Community with the hashtag #readinessreport.

And if you need more help with your transition to Lighting Experience, reach out to our Lightning accredited consultants.

We're excited to be on this journey to Lightning Experience with you, helping your customers love you even more.

Was this helpful?







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