Lightning Experience Readiness Report

DATE	ORG ID	EDITION	REPORT VERSION
08/29/2018	00D0S0000008twWUAQ (Sandbox)	Developer	5.4

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

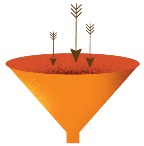
What's in This Report?

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.

Your Rollout Effort

To estimate your effort, we established an average for the number of hours that specific migration 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.

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 Visualforce Check from the Visualforce Pages section of this report.	
Custom buttons and links – URLs	1	1
Tweaks to other features (check your Effort Estimate spreadsheet for a list)	21	5

TOTAL IN HOURS	22	6

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.

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.

Almost Ready

Of the features and customizations we checked, these profiles have access to features that require some attention before rolling out Lightning Experience. However, these users could still be great candidates for your pilot program.

Profile Name	Number of Users	Features That Require Attention
Standard User	1	Salesforce Console, Cases
System Administrator	1	Salesforce Console, Cases
Inside Sales	2	Cases

Which Features Are Ready?

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	Ready After Your Review	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	Hard-coded URLs and My Domain	Solutions	
Home Page and Sidebar Components	Activities Setup	Data.com	
Reports and Dashboards Sharing	Cases		
Visualforce Email Templates			
Salesforce Knowledge			
AppExchange Packages			
Visualforce Pages			
Sharing Buttons			

Lookup Filters	
Lookup Fields	
Omni-Channel	
Entitlements	
Web Browsers	
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	App	When is it Coming to Lightning Experience?	User Impact
Documents	Analytics Studio, All Tabs	No plans to develop this feature for Lightning Experience. Looks like your users haven’t created any documents in the past 6 months, so you can probably move to Lightning Experience without this feature. Or, you can move to Salesforce Files to save, share, and collaborate around documents.	Included in 12 profiles, assigned to 4 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	Stay tuned. Lightning didn't strike yet.	Included in 3 profiles, assigned to 0 users
Opportunity Partners	Opportunity (Marketing) Layout , Opportunity (Sales) Layout , Opportunity (Support) Layout	Stay tuned. Lightning didn't strike yet.	Included in 3 profiles, assigned to 0 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 12 profiles, assigned to 4 users
UpsellCrosssellOpportunity	Case Layout , Case (Support) Layout	Included in 10 profiles, assigned to 4 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.

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. Enable reminders, and add them to page layouts >
2. 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.
3. 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.

Resources

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

Cases

Some features on your case page layouts aren't supported yet in Lightning Experience.

Users can't access these features in Lightning Experience. But don't worry. We recommend some workarounds.

Page Layout Containing Feature	Lightning Experience Recommendation	User Impact
Case Layout	This layout includes a case feed, which offers a different user experience from the Salesforce Classic layout. Before you move users, preview Lightning Experience from the Migration Assistant to see how case feed page layouts are different. Then let your users know what to expect.	Included in 9 profiles, assigned to 4 users
Case (Support) Layout	This layout includes a case feed, which offers a different user experience from the Salesforce Classic layout. Before you move users, preview Lightning Experience from the Migration Assistant to see how case feed page layouts are different. Then let your users know what to expect.	Included in 1 profiles, assigned to 0 users
Case (Sales) Layout	This layout includes a case feed, which offers a different user experience from the Salesforce Classic layout. Before you move users, preview Lightning Experience from the Migration Assistant to see how case feed page layouts are different. Then let your users know what to expect.	Included in 1 profiles, assigned to 0 users
Case (Marketing) Layout	This layout includes a case feed, which offers a different user experience from the Salesforce Classic layout. Before you move users, preview	Included in 1 profiles, assigned to 0 users

Lightning Experience from the Migration Assistant to see how case feed page layouts are different. Then let your users know what to expect.

Some actions on your case page layouts aren't supported yet in Lightning Experience, which means that users can't access them. But don't worry. We can recommend workarounds.

Action Label (and Name)	Layouts Containing Action	Lightning Experience Recommendation	User Impact
Change Status (ChangeStatus)	Case Layout , Case (Support) Layout , Case (Sales) Layout , Case (Marketing) Layout	The quick action ChangeStatus is available in Lightning Experience. To continue using it, recreate ChangeStatus in Lightning Experience. Then add the action to the case page layout for Lightning Experience.	Included in 12 profiles, assigned to 4 users
Log a Call (Case.LogACall)	Case Layout , Case (Support) Layout , Case (Sales) Layout , Case (Marketing) Layout	To set up users to track calls about cases in Lightning Experience, create a LogACall quick action. Then add the action to the case page layout for Lightning Experience.	Included in 12 profiles, assigned to 4 users

What should you do?

Follow the workarounds we suggested for each unsupported feature or action. For unsupported features and actions that you can't address, decide which users can work without these items, and move them to Lightning Experience. Learn More >

Resources

- Add Quick Actions to the Case Page Layout for Lightning Experience >
- Service: What's Not Available in Lightning Experience >

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	standard__ServiceConsole	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 >

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

Included in 9 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.

Hard-coded URLs and My Domain

Although you've enabled My Domain, certain URL references might not work as expected if you decide to use My Domain in Lightning Experience. You have to replace hard-coded references to your originally assigned URL with references to your new URL.

Here are some places where your Salesforce instance includes hard-coded references to your originally assigned URL. 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 your URLs.

Resources

- 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 >

Data.com

Your users are working with these Data.com features. Some Data.com features are different in Lightning Experience, and some are unavailable.

Clean, Prospector

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 >

Stay Engaged with Lightning Experience

We're constantly improving Lightning Experience and Readiness Check to make your migration 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?

Salesforce.com, Inc. The Landmark @ One Market, Suite 300, San Francisco, CA, 94015, United States General Enquiries: 415-901-7000 | Fax: 415-901-7040 | Sales: 1-800-NO-SOFTWARE