**Lightning Experience Rollout Checklist**

You are your company’s trusted advisor for Salesforce. To help your company make the move to Lightning Experience, you’ll need to become a Lightning Experience expert, and then design and execute a rollout plan. Here’s everything you need to get started.

**Educate yourself about Lightning**

* Complete Lightning Experience trails on Trailhead
* Watch Lightning Experience videos
* Get hands-on practice:
  + Enable in sandbox
  + Enable in production for yourself (Permission Set)
  + Enable in a free Developer Edition
* Read the latest Release Notes
* Review feature comparison charts and decide when to migrate to Lightning Experience

**Educate your company about Lightning**

* Demonstrate benefits for key stakeholders
* Share Lightning Experience with your leadership team and key stakeholders
* Direct business users and colleagues to complete Lightning Experience trails on Trailhead
* Share feature comparison charts with your leadership team and key stakeholders

**Craft your rollout strategy**

* Identify executive sponsor/project champion
* Identify super users
* Identify pilot group for Lightning rollout (optional)
* Create communication strategy
* Create training plan
* Create project schedule with milestones and dates
* Identify measures for success
* Take a snapshot of current metrics (to measure before and after)
* Create a Chatter group for project team communication and collaboration
* Create a Chatter group for business users to ask questions

**Execute your rollout plan**

* Activate your super users
* Direct users to Trailhead Lightning Experience trail for sales reps
* Conduct email drip campaign to drive awareness

**Enable Lightning Experience**

* Visit the Lightning Experience Setup page located at **Setup | Lightning Experience** for steps to enable

**Measure, monitor, & Iterate**

* Create reports and dashboards to measure key metrics
* Conduct business user surveys
* Connect on a monthly or quarterly basis with super users
* Report out to executive sponsors