Digital Business

Lightning Experience: The Next Generation of Salesforce

Understand how Salesforce Lightning plays a pivotal role in delivering an enriched user experience by redefining customer relationship management.

Executive Summary

Technological advancement has empowered and given customers control over the experience of purchasing products and services. Companies have thus shifted their paradigm from a focus on mere products and services to overall experience during the entire engagement lifecycle. To successfully adapt to this trend, which coincides with growing user expectations, companies must improve each touchpoint of their user experience (UX).

This white paper intends to review key components of the Salesforce Lightning framework. It will attempt to show how they help businesses rapidly deliver innovative applications to the market, in order to keep up with customer demands and enrich customer experiences (CX). We will also demonstrate how the switch to Salesforce Lightning Experience can help companies sustain growth and bridge the gap between their processes and customers' demands. Finally, we will introduce Cognizant's Light*Saber*, a meticulously tailored rollout strategy with ready-to-use, pre-built Lightning Components that help customers transform their current Salesforce Classic environment into a Lightning ecosystem across multiple industries and clouds.

Cognizant

How an organization delivers is becoming just as important as *what* it delivers.

CRM + UX + CX: The ultimate customer experience

Customers don't just seek products or services in and of themselves; they also demand more convenient processes throughout the entire engagement lifecycle. With exponential growth across industries, it is vital for organizations to live up to these demands and offer customers the ultimate experience.

According to Walker's "Customers 2020: A Progress Report," customer experience will soon overtake price and product as the key influence on customers' purchasing decisions, and 86% of buyers will be willing to pay more for a better customer experience.[1]

This is in line with Gartner's prediction that by 2022, two-thirds of all customer experience projects will make use of IT, up from 50% in 2017.[2] *How* an organization delivers is becoming just as important as *what* it delivers.

These stats indicate that an organization's customer relationship management (CRM) software should provide a richer, faster and more efficient user experience, and help bring new, innovative applications to the market for a greater competitive advantage (see Figure 1).

Business strategy

How important are the following to your business strategy – today and in 2020?
Average out of 100 points.

TODAY: Experience 43, Products 37, Price 20
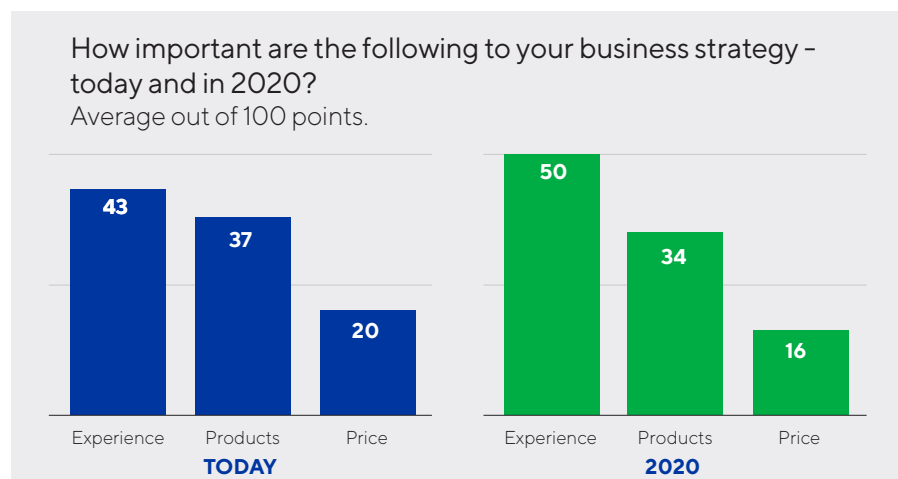2020: Experience 50, Products 34, Price 16

Figure 1
Source: www.walkerinfo.com/customers2020/

Salesforce Lightning: A user interface optimized for speed and increased productivity

Although the Salesforce Classic user interface offers a plethora of sufficient CRM features, end users still want fewer clicks and a more user-centric design approach that includes features such as drag and drop. To cater to this imminent need, Salesforce has introduced Lightning Experience: the next generation of Salesforce user interface optimized for speed and increased productivity.

With "mobile first" becoming a driving philosophy behind deployments, there is a growing demand for responsive user experiences and single-page applications. The tools and technologies provided by Lightning offer a new and modern user experience for both desktop and mobile applications. Figure 2 highlights the value proposition and benefits of Salesforce Lightning.

Value proposition and benefits of Salesforce Lightning

SALESFORCE LIGHTNING	VALUE PROPOSITION	BUSINESS BENEFIT
Lightning Experience	A user-centric design approach enabling end users to be more productive at every point in the engagement lifecycle.	Smoother adoption and collaboration.
Lightning Framework	An event-driven framework with aligned tools allowing partners and customers to build custom components to facilitate business processes.	Enhanced productivity and reduced time-to-market.
Lightning Ecosystem	Lightning-ready apps and components available through AppExchange that can be plugged in directly to meet specific business needs.	Better IT productivity and cost efficiency.

Figure 2

Understanding which features of Salesforce Lightning that you can leverage is essential to deciding whether to migrate and, if so, whether it's necessary for all users.

Migrating from Salesforce Classic to Lightning Experience

Understanding which features of Salesforce Lightning that you can leverage is essential to deciding whether to migrate and, if so, whether it's necessary for all users. End users across different departments may have unique needs. For example, a service agent may have completely different requirements than that of a sales representative or a company advisor. Therefore, a best practice is to develop different user personas and prioritize functionalities for each. Figure 3 highlights what's new.

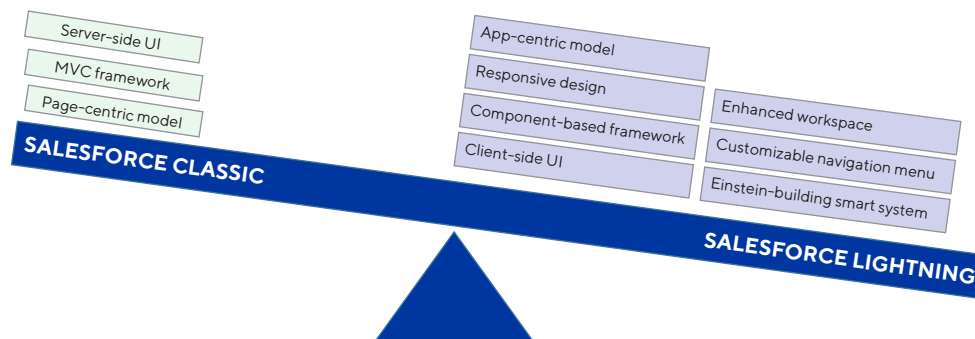### Salesforce Classic vs. Salesforce Lightning

Server-side UI
MVC framework
Page-centric model

App-centric model
Responsive design
Component-based framework
Client-side UI
Enhanced workspace
Customizable navigation menu
Einstein-building smart system

SALESFORCE CLASSIC

SALESFORCE LIGHTNING

Figure 3

Exploring the building blocks of Salesforce Lightning

SALESFORCE LIGHTNING	**Lightning Experience**	Enriching the user experience has always been the focus of Salesforce, and Lightning Experience is no exception. Though Salesforce Classic offers a wide range of features, there was still ample room for enhancing its benefits.
	Lightning Framework	Apart from its many out-of-the-box features, Salesforce Lightning supports customizations through its flexible Lightning Framework, which can be considered the underlying support system for all of the Lightning features depicted in Figure 3, (see page 4). The framework has an event-driven architecture and provides a runtime environment, out-of-the-box components, and libraries for building custom components that you can use to meet business needs and deliver new applications faster.
	Lightning Components	Lightning Components are like reusable building blocks that make customizations possible by click instead of code.
	Lightning App Builder	Another crucial feature that Salesforce has introduced as part of Lightning Experience is Lightning App Builder. Until now, building an app to serve a business process or module has been a cumbersome task that could delay time to market by weeks or even months. The Lightning App Builder addresses this pain point with a drag-and-drop, point-and-click tool that expedites app development by allowing custom components to be leveraged across multiple apps.
	Lightning Design System	With Lightning Design System, Salesforce has introduced a new way to design, build and deliver custom, pixel-perfect apps. Design System enables creation of custom apps with a look and feel that is in harmony with Salesforce Lightning, and follows the Salesforce design principles of clarity, efficiency, beauty and consistency. It can be used in conjunction with Lightning Components and Lightning App Builder and eliminates the need to add static resources to Lightning Components. It also bundles CSS frameworks, icons, fonts and design tokens.
	Salesforce Connect	Since data collection often requires connection to external systems, Salesforce Connect offers a framework that enables users to view, search for and modify data stored outside of Salesforce. Data from a wide variety of external systems can be accessed and seamlessly integrated into any Salesforce environment in real time. There is no need to copy data into Salesforce, and data can be pulled from legacy systems with point-and-click simplicity. The Apex Connector Framework also allows design and construction of customer adapters to meet the specific needs of your business.
	Locker Service	For most businesses, security is always a top priority. That's why Salesforce has introduced Locker Service, which adds an additional layer of security and protects Lightning components from unidentified access and cyber threats. This robust security architecture isolates Lightning components in their own namespace and only allows access to supported application programming interfaces (APIs). It constantly monitors components for unauthorized data access and prevents components from reading the rendered data of other components without any restriction. Locker Service employs more secure JavaScript development practices to better serve the needs of Lightning applications.
	Lightning Out	Many organizations need to share centrally accessible information outside of Salesforce. This is now possible thanks to Lightning Out, which allows Lightning Components to be bundled and embedded on a given web page, thereby affording access to CRM features outside of Salesforce. This gives users the flexibility to directly access information from a desired webpage without having to log in to Salesforce.

Figure 4

Exploring the building blocks of Salesforce Lightning *(continued)*

SALESFORCE LIGHTNING	**Lightning Bolt**	Communities also stand to benefit greatly from Lightning Experience. With Lightning Bolt, we can now leverage prebuilt, personalized and mobile communities in Salesforce. This helps create communities that are in sync with business use cases and offers seamless integration with Salesforce. Lightning Bolt has emerged as the fastest way to develop, package and deliver a community. Communities can be customized with the Lightning Bolt framework, Lightning Components and Community Builder. As with App Builder, Community Builder's drag-and-drop capability facilitates the design and publishing of communities.
	Lightning Data Services	Lightning Data Services (LDS), the data layer of Lightning, provides access to the data being displayed on a page. It helps identify and eliminate independent calls to servers to perform data operations, and sends single, shared data requests that update all relevant page components; this feature makes data more consistent. LDS also allows work offline, and syncs data once reconnected.
	Lightning Testing Services	As a key part of the Lightning Experience, Lightning Components can contain a significant amount of untested JavaScript. Lightning Testing Services (LTS) is a set of tools and services that enables you to develop test suites for your Lightning Components using standard JavaScript test frameworks (e.g., Jasmine is one the popular frameworks that can be used for execution of LTS). Lighting Testing Services consists of two major components: LTS managed package (infrastructure) and LTS command for Salesforce CLI (automates running the test suites).

Figure 4

Lightning + Salesforce Einstein promises business advantage

The development and application of artificial intelligence is growing exponentially across industries. Lightning harnesses this trend with Salesforce Einstein – a set of capabilities that have the potential to remove the guesswork from business processes. Some of the latest innovations of Salesforce Einstein include Einstein Lead Scoring, Einstein Opportunity and Account Insights, Einstein Journey Insights, Einstein Recommendations and Einstein Vision. When closely integrated with Lightning Experience, Salesforce Einstein can improve lead scoring and opportunity insights and save time through its Activity Capture feature. Salesforce Einstein can be utilized in sales, services, marketing, apps, communities, analytics and commerce.

Transitioning to Lightning Experience

The transition and rollout strategy for Lightning Experience is uniquely tailored to each end user. To decide which rollout strategy works best for you, Cognizant creates primary and secondary user personas and stories to understand the goals and needs of specific end users.

Following are two rollout strategies that we recommend:

❚ **Org-based rollout.** This strategy does not rely on user personas and thus delivers a consistent user experience, along with focused learning programs for all end users.

❚ **Persona-based rollout.** This strategy concentrates on a fine-tuned and controlled rollout for each persona identified. It involves heavy customization to ensure that each user sees the most relevant data.

Cognizant Light*Saber*: The straightest path to painless deployment

Now that we've seen how Lightning Experience enriches user experiences, let's explore how it can rapidly benefit your business.

We recommend transitioning to Salesforce Lightning Experience using our meticulously crafted Light*Saber* rollout strategy: the best way to address all of your business, technical and change-management needs.

Stage 1: Gather and analyze

The objective of this stage is to "visualize" the transition to Lightning Experience. We perform a portfolio analysis, define key success metrics and exhaustively verify its feasibility within your organization. Then, we recommend either an org-based rollout or a persona-based rollout by identifying which applications are likely to benefit from investment in Lightning transition during the Lightning enablement process.

Stage 2: Plan and understand

The purpose of this stage is to formulate an implementation strategy that covers resourcing, budgeting, change management, compliance, deployment and support.

Stage 3: Build and deploy

This stage focuses on transitioning your organization from Salesforce Classic by building and deploying Lightning Experience and its associated components. Cognizant has a rich repository of prebuilt components and applications that are Lightning-ready and can be deployed directly according to your organization's needs and processes.

Stage 4: Adopt and excel

This last stage aims to oversee proper user adoption via communication, training and ongoing post-deployment support. Using our Lightning Adopt Assist tool, Cognizant will ensure that your users are comfortable with the changes that have been introduced as part of Lightning Experience.

Cognizant Light*Saber*: The straightest path to painless deployment

Gather & Analyze 01
- Engage in transition to Lightning
- Set objective & define key success metrics
- Carry out readiness check and fit gap analysis
- Identify potential challenges
- Make recommendation – org-based or persona-based transition

Plan & Understand 02
- Implement execution model
- Check for org cleanup and optimization
- Employ capacity and resourcing model
- Estimate budgets
- Execute release and environment management
- Deploy quality assurance strategy
- Engage deployment and adoption strategy

- Initiate functional analysis and assimilation
- Adopt design
- Build and test
- Execute transition
- Carry out user onboarding on Lightning

03 Build & Deploy
- Engage in user communication & onboarding
- Provide adoption assistance & analysis
- Implement Adopt Assist Lightning to support quick adoption
- Train users
- Carry out support and enhancement request
- Collaborate with customer to evolve with Lightning
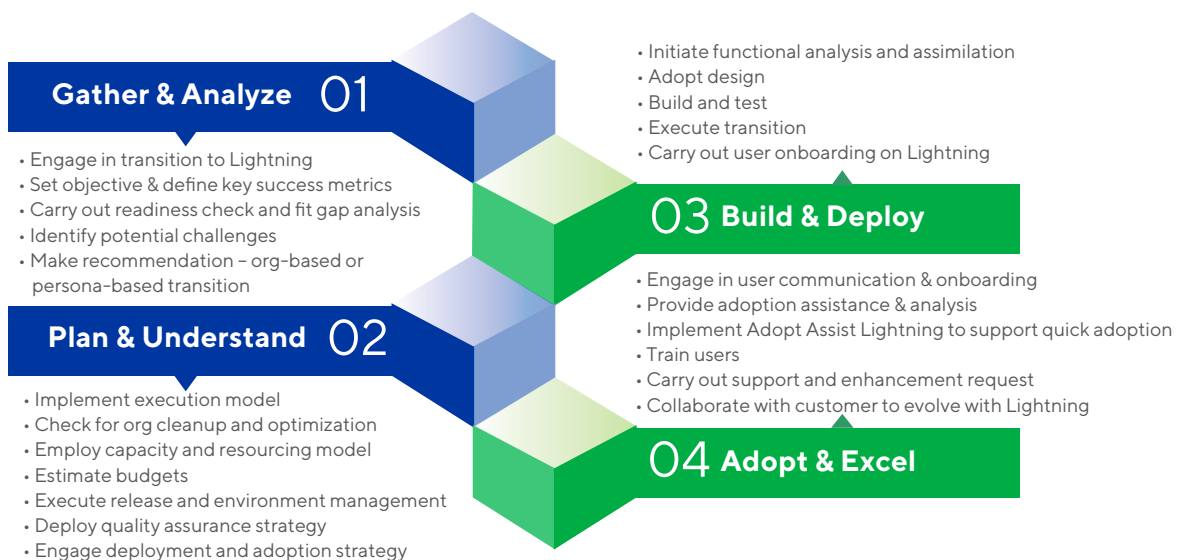
04 Adopt & Excel

Figure 5

Looking ahead: best practices and considerations

Though Salesforce provides the necessary tools, framework and guidelines for implementation of Lightning Experience, we always recommend following these best practices for a smooth and successful transition:

❚ Know your users and their needs. Group and prioritize them by their roles, goals and motivations.

❚ Invest time in understanding the apps, and identifying areas, pages and clicks that can be automated and/or enhanced for better productivity.

❚ Embrace simplicity by only displaying the fields absolutely necessary to support the needs of a given persona.

❚ Take advantage of Lightning's features to enrich and customize your user experience.

❚ Organize components according to the needs of your business so that they can be leveraged and reused across other apps with similar functionality.

❚ Develop components that are compatible with Locker Service to protect valuable data and other resources.

❚ Engage in early and ongoing communication with end users, which is essential to smooth adoption.

Enriching user experience is an evolving and ongoing process, which means that as solutions mature, their impact on your enterprise will be increasingly profound. Consequently, there is no better time to include optimization of customer and user experiences in your strategies for streamlining processes, driving profitable growth and transforming operations.

Endnotes

1   "Customers 2020: A Progress Report," Walker, https://www.walkerinfo.com/knowledge-center/featured-research-reports/Customers-2020.

2   Gartner Says 25 Percent of Customer Service Operations Will Use Virtual Customer Assistants by 2020," Gartner press release, February 19, 2018, https://www.gartner.com/newsroom/id/3858564.

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Cognizant Enterprise Application Services

As a Salesforce Global Strategic Consulting Partner, we have extensive experience delivering end-to-end cloud programs. Our home-grown, ready-to-use repository of Lightning components, applications, tools and accelerators are designed to cater to various business needs across industries—helping you smooth your transition to Lightning Experience.

About Cognizant

Cognizant (Nasdaq-100: CTSH) is one of the world's leading professional services companies, transforming clients' business, operating and technology models for the digital era. Our unique industry-based, consultative approach helps clients envision, build and run more innovative and efficient businesses. Headquartered in the U.S., Cognizant is ranked 193 on the Fortune 500 and is consistently listed among the most admired companies in the world. Learn how Cognizant helps clients lead with digital at www.cognizant.com or follow us @Cognizant.

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