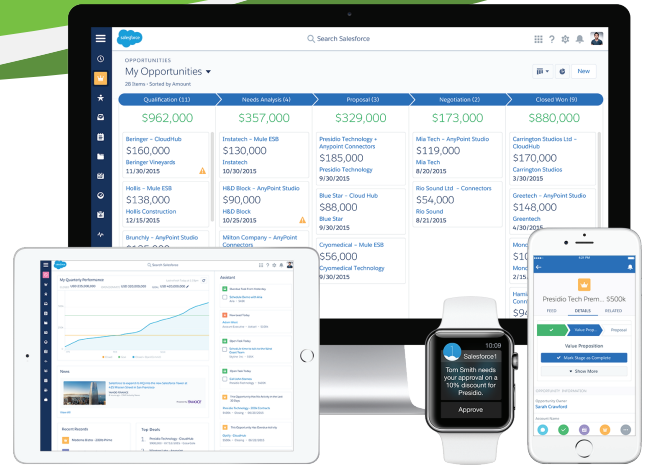# SALESFORCE LIGHTNING TRANSITION ASSESSMENT

A Comprehensive Assessment Model to Eliminate Risk

PLANNING AHEAD

If you're considering making the switch to Lightning Experience from Salesforce Classic, it is critical you have a thorough plan to ensure a seamless transition so you can reap the measurable benefits the latest version promises.

The first step in your transition journey is to complete the Salesforce Lightning Experience Readiness Check, but you shouldn't stop there. While you can gain a fair amount of insight into how you might approach a Lightning launch, it is not an exhaustive guide on how to prepare for the transition. It takes more than a one-click assessment to understand all the critical factors and considerations involved with building a transition strategy that will work for your organization.

1,700+
Known Lightning issues reported in the Trailblazer Community

3 – 5X
Multiplier of work required to transition compared to Salesforce's readiness check estimates

$5,000
Average cost of an exhaustive Lightning evaluation to avoid missteps and rework

Converting to Salesforce Lightning doesn't have to be painful. It just requires research, planning, and testing to achieve a positive outcome.

Don't Just Scratch the Surface

The Lightning Readiness Check delivers high-level planning assumptions based on the basic metadata available for your Salesforce org. Chances are, you have some degree of customization, apps, and coding built into your specific instance that is beyond the reach of the check. Without a more comprehensive view of your unique environment, you can end up grossly underestimating the level of effort involved in making the transition. Incomplete planning can affect multiple stakeholders, and the cost and time it takes to go back and course correct can far exceed the initial cost of the transition.

Salesforce recommends a manual review of your company's features and customizations not covered by the Readiness Check before rolling out the Lightning Experience to your users. The more sophisticated (or complex) your Salesforce org is, the more critical it is to do a deeper assessment to accurately scope the scale, time and resources it will take to successfully transition to Lightning.

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Leave Nothing to Chance

Having compared Readiness Check estimates against actual customer Lightning transition projects, Configero offers a cost-effective assessment that delivers accurate time, budget and resource estimates, along with specific recommendations to support a smooth transition to Lightning.

Our experts have discovered the level of work required to effectively transition to Lightning can be **4X** what the Lightning Readiness Report estimates.

UNCOVER

A detailed analysis of the features and functionality enabled in your Salesforce org as they relate to Lightning compatibility

AUDIT

Key considerations and critical items that are typically left out of Lightning readiness assessments which can lead to significant performance issues

GUIDE

A detailed document that serves as the foundation for an effective transition project with next-step guidance for further investigation

CALCULATE

An informed estimate of the time, budget and resources needed to ensure a successful, painless transition for your organization

You'll have the option to apply the evaluation fee towards a more in-depth Lightning Roadmap, or a Lightning Launch executed by Configero's team of Salesforce experts.

While We're At It...

The transition to Lightning is also the perfect time to identify where you can streamline your Salesforce org, aligning it more closely to current business processes to increase adoption, productivity, and performance.

As part of the Lightning assessment, Configero examines underutilized or inactive fields, page layouts, dashboards, reports, features and applications that aren't being used or are no longer needed. Incorporating these broader recommendations into your roadmap helps ensure you don't take an over-engineered, overly complex Salesforce instance and transfer that same architecture to your new Lightning experience.

What Are You Waiting For?

According to Forrester Research, companies who made the switch fully realized productivity savings after just six months of working on the Lightning Platform. Trying to determine what it will take to successfully turn on the Lightning experience for your company?

Contact Configero to learn more about the Lightning Transition Assessment model and start planning your journey to the future of sales and CRM.

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