

# **PATH TO ENTERPRISE EXCELLENCE WITH SALESFORCE LIGHTNING**



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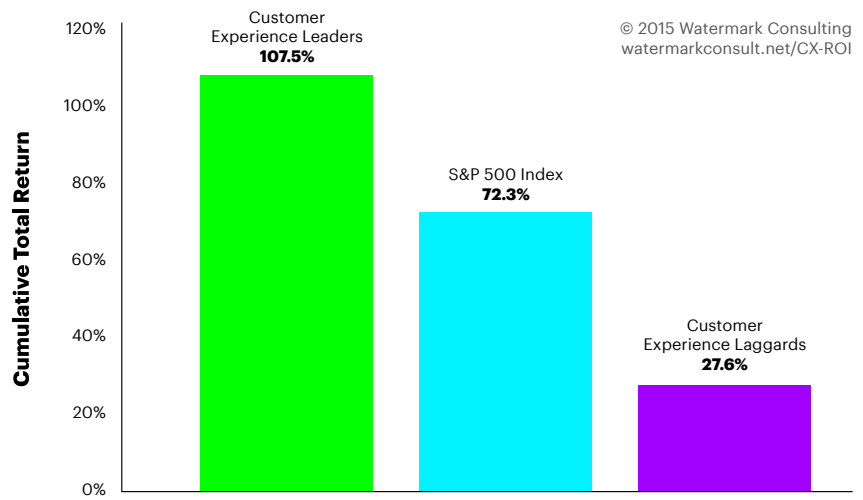
Get Started with Salesforce Lightning with Accenture

## IMPROVING THE USER EXPERIENCE WITH SALESFORCE LIGHTNING

We now live in a customer-dominated economy, where CRM has become pivotal to the growth and maintenance of any business. Against this backdrop, every organization has to run faster than its current pace simply to retain existing customers, let alone attract new ones. While the market is growing at an incredible pace, companies must focus on delivering a world class customer experience to achieve noticeable growth. As the graph below illustrates, focusing on customer experience has a direct impact on the financial success of organizations and their relative surge in stock prices.

### Customer Experience Leaders Outperform the Market

8-Year Stock Performance of Customer Experience Leaders vs. Laggards vs. S&P 500 (2007-2014)



Source: Watermark Consulting

Salesforce Lightning can help companies achieve the necessary customer experience excellence by delivering a modern user experience that bridges the gap between customers and businesses. Specifically, Salesforce Lightning can help companies provide a smarter and faster experience for customers and allow IT and business users to bring new applications to market faster to meet customer demands. Additionally, Salesforce ensures Lightning stays up to date with and even ahead of evolving industry standards by delivering regular extensions and enhancements.

The future of every CRM software is anchored to the fluid architecture of the overall system, including its flexibility to accommodate rapid changes in the market and deliver on ever-evolving customer expectations. Salesforce Lightning is a huge step in this direction, as the framework puts Salesforce in a strong position to conquer the all-important “disrupt or be disrupted” philosophy that has taken hold of the modern day business environment.

## THE BEST WAY TO APPROACH SALESFORCE LIGHTNING

Lightning is the next generation user interface in Salesforce aimed at improved productivity and enhanced user experiences. Salesforce first invested in Lightning as an underlying framework for the Salesforce1 mobile app. However, Salesforce soon brought Lightning to the desktop, and with it an entirely new user experience across all devices.

Although organizations realize the need for enhanced user experience, taking a direct replacement approach leaves value on the table because Lightning is more than just an update to the Salesforce user interface. Rather, Lightning is a next generation framework for Salesforce apps that presents entirely new opportunities, such as the ability to rapidly build user friendly applications on different screens and for different devices and contexts. Additionally, Salesforce tells us that Lightning is the future and will be the focus for all new Salesforce innovation.

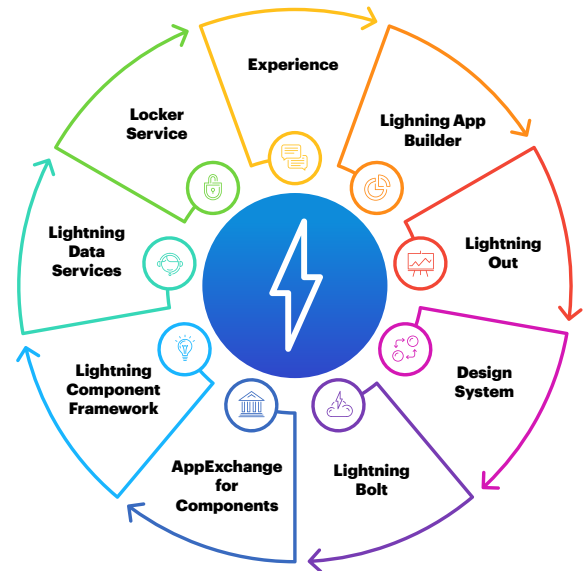
With this understanding of Lightning in mind, it's clear that the best way to approach Salesforce Lightning is to think strategically about all the pieces of the platform and how you can use them in tandem with one another across different channels.

## BREAKING DOWN THE SALESFORCE LIGHTNING PLATFORM

How does the Salesforce Lightning platform represent such a notable change from Visualforce? And what does the entire Lightning platform entail? Here's what you need to know.

### Deep Dive into Lightning Platform Capabilities

When it comes to the Lightning platform, Lightning Experience tends to get all the press – and for good reason since most efforts will be concentrated there – but in truth it's only one piece of the larger Lightning platform. And in order to truly reap the benefits of the Lightning platform, you need to take advantage of it in its entirety. So what else does the Lightning platform enable?



### Lightning Experience: A modern user interface optimized for speed

User experience is at the heart of Salesforce Lightning, and Lightning Experience is the result of Salesforce's strong emphasis on this agenda. Although Classic UI (Aloha) delivered all the necessary CRM functionality, there was abundant room to improve the end user experience with features like drag and drop or responsive design. To solve this challenge, Salesforce introduced a user-centric design approach via Lightning Experience. Notable improvements offered via Lightning Experience include a completely redefined home page experience, Kanban view for opportunity, enhanced workspaces, new dashboards, enhanced search and dynamic tab navigation.

### Lightning Framework: A framework for building reusable components and customizing apps

Flexibility to support customization is as important as the out-of-the-box Lightning features. In order to meet this need, Salesforce has provided this framework as part of the Lightning platform. The Lightning Framework is the core engine that powers all Lightning features in Salesforce. This event-driven framework provides the runtime environment, out-of-the-box Lightning components and required libraries to build custom components. It also executes all the instructions that a component exerts within an app acting as a bridge between client side code and server side code, the Lightning Component Framework stands at the core of the Lightning platform and translates every user interaction on the screen into action. Additionally, component developers can expose component properties to allow the same component to be configured differently in different locations of the app, further enhancing component reusability. This helps ISVs and developers a standard framework to give their customers declarative customization.

## **Lightning App Builder: A drag and drop technology to make building and customizing apps quick and easy**

In today's fast paced business environment, time to market is pivotal to ensuring a competitive edge. However, developing and releasing a custom app typically takes weeks or even months, creating a significant time gap that often prevents organizations from meeting customer needs in a timely fashion. Salesforce addresses this problem by introducing the Lightning App Builder, an easy to use, point-and-click tool that helps even non-technical users rapidly compose Lightning apps according to business requirements by using drag and drop functionality. Lightning App Builder not only speeds up app development, but it also serves as a platform to host enterprise-wide custom Lightning components that can be reused across apps, leading to greater productivity than ever.

## **Lightning Out: Enabling Lightning components to run in applications outside of Salesforce servers**

Lightning Out offers an intuitive way to extend CRM capabilities outside of the Salesforce platform. Consider a situation where users want to quickly browse account contacts within an external application, be it a customer portal, SharePoint or any other third-party web application. Lightning Out enables developers to bundle Lightning Components, such as a JavaScript library, and embed them in the desired web pages. This way, users do not need to log into Salesforce to obtain necessary information and can instead do so from directly within the desired third-party application. This flexibility is very much required in organizations where centralized access to information is critical and not limited to Salesforce servers.

## **App Exchange for Components: Providing access to out-of-the-box partner components**

Salesforce provides a comprehensive component exchange for Lightning components where third party software vendors can distribute and sell their custom Lightning components to buyers. It is a unified market place where businesses can find ready-to-use components that are not available out-of-the-box in Salesforce. Accenture offers 30+ ready-to-use custom Lightning components through its internal component library available to clients.

## **Lightning Bolt: A library of portal templates**

Lightning Bolt is Salesforce's answer to next generation community and partner portals with a seamless integration to Salesforce CRM. Based on a reusable template concept, Bolt enables organizations to build Lightning-based community templates that are fully compatible with Lightning

components and bring all the user experience benefits to community users. Salesforce also offers Community Builder, a dedicated point and click app building tool like Lightning App Builder that enables end users and developers to rapidly build and deploy community portals. With Bolt, Community Portals can now host complex business logic, case management and even e-commerce, all delivered with ease of drag and drop style development.

## **Lightning Design System: Style guides and modern UX best practices to build pixel perfect apps**

Lightning Design System is a set of UX guidelines, CSS framework and general design specifications for easy reference for developers building Lightning apps and components. It helps developers design and build apps that are consistent in terms of look and feel with the Salesforce ecosystem without limiting creativity. Guiding developers to ensure web accessibility, appropriate use of colors, images, icons and overall user experience are some of the key driving factors behind Lightning Design System.

## **Lightning Data Services: An efficient way to access Salesforce data in Lightning Components**


As Lightning encourages component based development, there comes the complexity in accessing and sharing data securely when multiple components are involved in orchestrating a use case. In earlier days, each component was responsible for loading, creating and editing Salesforce data by leveraging server side Apex and SOQL. Although this approach worked just fine, there was always room to make this process much more efficient and avoid redundant server side calls for the same data. Salesforce has introduced Lightning Data Service, a framework that makes use of client side caching technique through a Shared Record Cache which enables a local pool of Salesforce data with high data integrity and presents consolidated server side requests through automatic SOQL execution in the server side. This helps developers to fully rely on client side controllers to request data and eliminates the need for server side Apex controllers and opens various possibilities such as improved performance, offline data capabilities etc.


## Locker Service: A Lightning security framework that guards components from malicious attacks


Every time a new technology is embraced for their lucrative benefits, more emphasis has to be made to address the security needs to ensure the system meets the standards with an optimal performance guarantee. Any system that is connected to the internet is no exception to constant cyber threats from hackers, malicious attackers, cyber criminals etc. Lockers Service has been designed to increase protection for Lightning apps from possible vulnerabilities to such malicious attacks. Locker Service provides a governing framework inside Lightning container in order to aide against attacks by constantly monitoring and help prevent components from attacks such as Cross Site Scripting (XSS), unauthorized inter-component communication and data access, access to private APIs etc. Additionally, Locker Service also encourages JavaScript best practices, client side API versioning and custom security policies to suit application needs.


## How the Lightning Platform Improves Upon Visualforce & Presents New Opportunities

There are four key capabilities that set Lightning apart from Visualforce:

 **Reusability:** Lightning relies on a component-based design that allows you to build something once and reuse it across any number of screens, platforms and use cases. Whereas Visualforce used static pages that required you to build components over and over again for each page, Lightning offers a dynamic experience that allows you to build components once and deploy them on any number of pages.

 **Resilient user interface:** Apart from reusability, one of the compelling benefits of Lightning is the resilience of the user interface that can be achieved through a responsive UI which renders applications regardless of screen size.

 **Ease of use:** Lightning builders (Community Builder/App Builder) use a drag and drop builder interface, making it easy for users to build lightning applications for Sales Cloud, Service Cloud and Marketing Cloud, and lightning communities for partners, customers or employees, using any available OOTB or custom lightning components. Visualforce based pages, on the other hand, usually requires additional development effort.

 **Platform agnostic approach:** Portability is one of the biggest advantages a technology can benefit from as far as user adoption is concerned. Be it iOS or Android, Windows or Mac OS, Salesforce Lightning delivers a seamless user experience across platforms.

## HOW TO TAKE ADVANTAGE OF EVERYTHING SALESFORCE LIGHTNING HAS TO OFFER

Once you recognize why it's so important to develop a new, Lightning-specific strategy (not just re-use your Visualforce strategy) and take advantage of the entire Lightning platform (not just Lightning Experience), how do you actually make that happen?

### Best Practices for Migrating to the Lightning Platform

Accenture recommends taking a business engagement-centric approach to introducing Lightning.

#### PHASE 1: DEFINE VISION & GOALS (Pre Go-Live)

To start, you need to define your UX goals, identify existing user experience gaps, determine success metrics and evaluate Lightning readiness using the Salesforce Lightning readiness checklist tool. Key activities include:

- Planning desired business impact
- Setting UX objectives
- Defining key success metrics
- Conducting a system gap and pilot group analysis
- Performing a Lightning readiness check
- Assessing readiness check report

**Goal:** To clearly understand UX objectives and how they will transform the end user experience

#### PHASE 2: AWARENESS & UNDERSTANDING (Pre Go-Live)

Next, you need to identify high impact business scenarios for a pilot program. Once you've identified the use cases, you can convert them to Lightning and release the solution to select pilot users for feedback and identify technical pitfalls. Key activities include:

- Taking steps around early stakeholder/user engagement
- Developing executive sponsorship messages
- Launching a system preview
- Establishing process to track and maintain Custom components in a Component Library.

**Goal:** To garner excitement about the upcoming change and ensure confidence that the larger team knows what will be needed

### PHASE 3: RAPID ADOPTION & PROCESS INTEGRATION (Go-Live)

Based on the pilot feedback and lessons learned, you can plan to migrate the complete functionality and rollout the new system for all users. Key activities include:

- Driving user enablement through:
  - E-learning sessions (walk-throughs, videos)
  - Hands-on exercises
- Developing a Lightning Experience information tab for ongoing access to resources
- Re-use/Maintain custom components in a Component Library

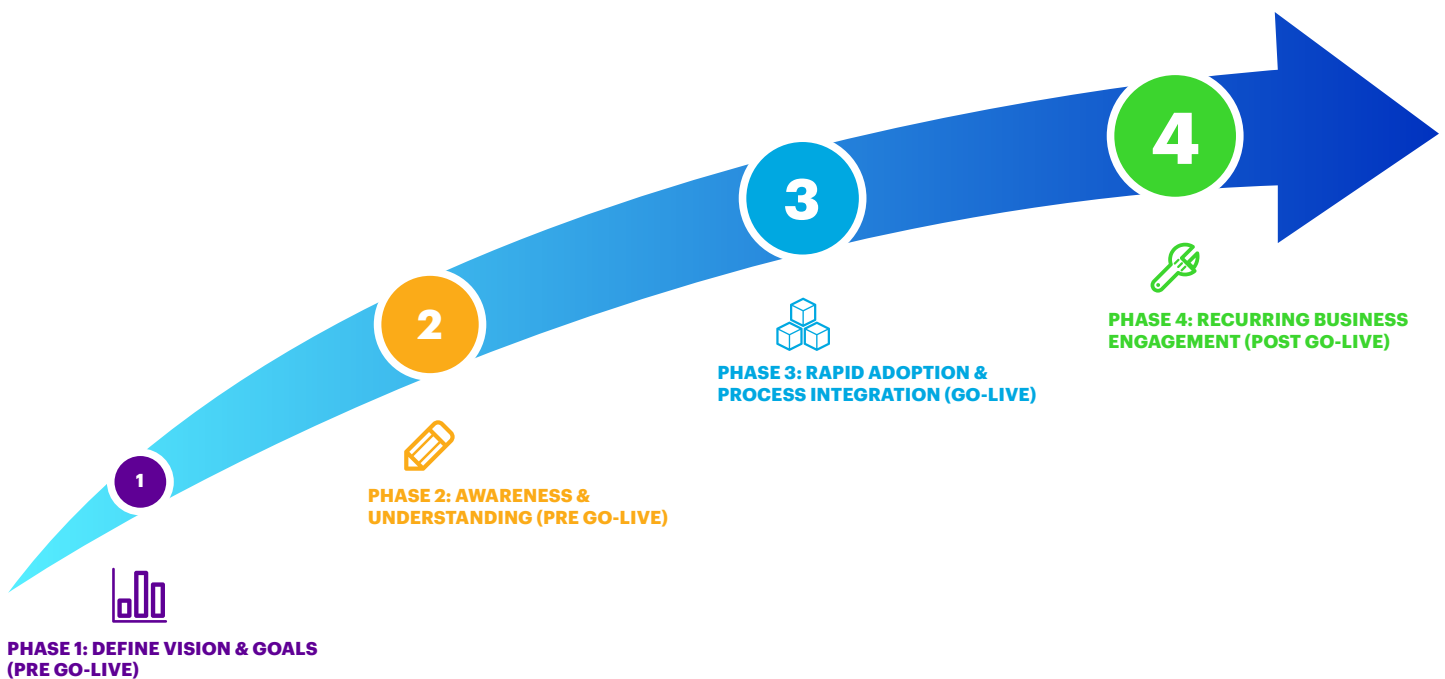
**Goal:** To help users feel confident in the new system and provide them with a place to go if they need help

### PHASE 4: RECURRING BUSINESS ENGAGEMENT (Post Go-Live)

Finally, you can work to attain process maturity by establishing a continuous feedback loop with end users and maintaining the system through releases. Key activities include:

- Analyzing the business impact
- Determining status of UX objectives
- Measuring progress against key success metrics
- Evaluating system usage

**Goal:** To realize value of the system and its ability to help the business better serve customers





## Skills Matrix Recommendation

Salesforce Lightning development requires the following skills according to the development role. Salesforce trailhead is a great way to rapidly train resources in Lightning. However, developing custom Lightning components requires additional skills like CSS, JavaScript and HTML5.

Role	Salesforce.com	Lightning App Builder	Lightning Design System	Apex	JavaScript	CSS3	HTML5
Application Architect	✓		✓				
Technical Architect --	✓		✓	✓	✓	✓	✓
Developer	✓		✓	✓	✓	✓	✓
Business Analyst	✓	✓					

### Best Practices for Using the Salesforce Lightning Platform

Although Salesforce Lightning offers the platform, all the necessary tools and guidelines to develop apps and components, developers are still not free from some of the common mistakes that can be avoided by adhering to these best practices.

**Security:** Security is of paramount importance for any application. Salesforce Lightning packs built-in security via Locker Service. This service helps to support that applicable code does not perform unintended or unauthorized malicious activities. Accenture strongly recommends developing Locker Service compatible components to ensure the application runs smoothly and to protect valuable resources. We also recommend using Salesforce's Lightning Command Line Interface (CLI) tool, which scans code for security violations per Locker Service standards and helps developers address any issues.

**Component Based Design:** Since Lightning is a component based framework, it is important to design applications by cohesively organizing functionality into meaningful components that can be reused across other apps where such functionality is required. For example, if an application requires you to display a list of account related contacts, developers can build a list component for displaying the contacts which can then be used in any app that requires this functionality.

**User Experience:** Lightning is all about enhanced user experiences, and developers should always keep the user experience at the center of any app development. For example, if the classic UI has 10 different steps or clicks to achieve a workflow, developers should look for a way to reduce the number of intermediate steps by automating certain sections. The key is to identify which areas are suitable for automation to reduce the number of clicks and user inputs in order to create a better user experience and boost productivity.

## GET STARTED WITH SALESFORCE LIGHTNING WITH ACCENTURE

Ready to reap the benefits of the full Salesforce Lightning platform? Accenture is here to help.

From the start of your cloud journey onward, your organization will have the advantage of our deep experience. Accenture is a leader in cloud applications and we've applied our extensive cloud applications management expertise to help organizations better maintain and advance their cloud programs. Ultimately, our goal is help shape and deliver transformational programs in order to drive real innovation and value and maximize the benefits of cloud technology.

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