Migrating from Salesforce Classic to Lightning Experience

About the Client

Healthcare revenue cycle management company to manage healthcare reimbursement. They have cloud-based claim management to streamline workflows and enabled providers to understand and improve financial performance.

Business Needs

Client wanted to shift to the Lightning interface to provide more natural user experience than the familiar Salesforce Classic. However, migrating to Lightning presents challenges to existing Salesforce modifications and processes
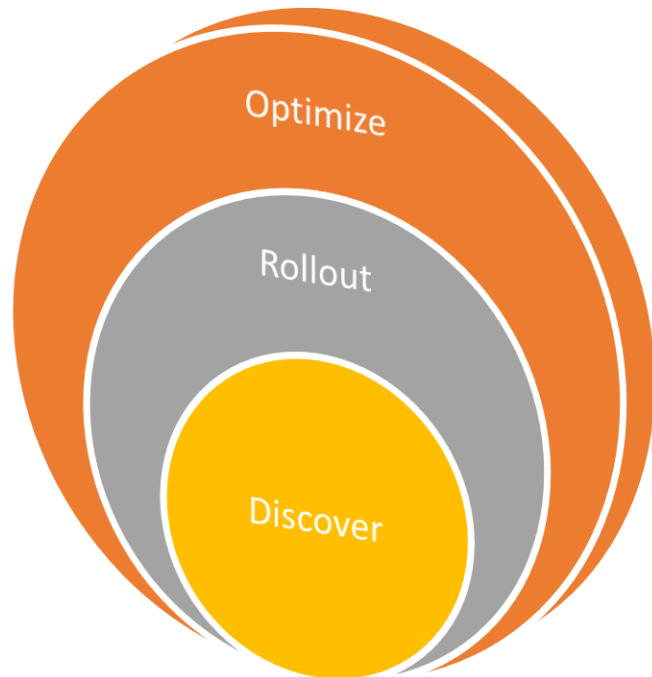
Solution

- Studied department wise, role wise current application navigation & flow
- Identified Gaps between Salesforce recommended practices & current configuration & setup
- Proposed department wise migration strategy
- Rebuild common features into Lightning component
- Conducted User meet ups with internal team for encourage adaptation
- Review User feedback post roll out and optimize process.

Optimize

Rollout

Discover

The new Lightning experience offers tons of new functionalities and a beautiful interface making data look much friendlier and more impressive.

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