

Salesforce® Lightning Conversion Provides Riverbed Technology with Enhanced UI Experience for All Business Users

Products & Services

- Salesforce Sales Cloud®
- Salesforce Service Cloud®
- Salesforce Service Console

Client – Riverbed Technology, Inc.

Industry – Information Technology

About the Client

Riverbed Technology, Inc. is an American Information Technology company focused on network performance monitoring, application performance management, edge computing, Wi-Fi, and wide area networks (WANs). Founded in 2002, the company has served more than 30,000 customers including those on the Forbes Global 2000 list. It is headquartered in San Francisco, California.

Business Requirements

- Perform detailed readiness and compatibility analysis of existing systems
- Conduct workshops with all business units to socialize and gather inputs for lightning conversion
- Implement compatibility and high priority changes across entire organization
- Implement a robust Service Console for Global Support Operations
- Support design and advisory for collaborative forecasting
- Create and support implementation of change management plan

Business Requirements

Project Scope Focused on Converting Existing Functionality

Many companies these days are making a transition from Salesforce Classic to Lightning as an organization wide initiative. Several challenges are presented during transition depending on an organization's existing use cases and complexity. Riverbed has an extremely mature instance of the Salesforce platform and has been working with a variety of complexities ranging from highly customized Visualforce pages, custom buttons, AppExchange products and more. The purpose of this transition for them was to be able to embrace and utilize the new features offered by Salesforce Lightning out of the box with minimal new customizations. Additionally, their goal was to be able to provide more robust and modern experience for their users, enabling them to more efficiently handle business and interactions with their customers.

Business Challenges

For Riverbed to be able to fully utilize the new features and interface presented by Salesforce Lightning, a conversion from classic was needed. Salesforce will eventually plan to stop support of Salesforce Classic and hence moving to Lightning as soon as possible is an intelligent infrastructure transition that will allow Riverbed to continue to operate with support as well as prevent itself from generating additional technical debt in Salesforce Classic.

Business Challenges

- Transition to Salesforce Lightning to be correctly positioned for additional business growth and support of IT initiatives
- Compartmentalization of lengthy pages needed to be reorganized into tabs and sub tabs to reduce time to find required information

- Custom buttons and several Visualforce pages need to be optimized or converted to display and perform correctly in Lightning
- Development of a lighter Lightning knowledge component to interface with existing Oracle knowledge database and display knowledge information easily for users
- Dynamic content change based on a specific asset
- Extremely stringent timelines for project deliverables
- Large number of user groups (approximately 20) that needed to be individually addressed to gather business needs and participate in UAT to ensure seamless change management
- Business teams were used to using either the Service Cloud app or the Service Console in classic, but the selection was purely based on a user's individual preference

The Solution

- Detailed reviews with all stakeholders in departments ranging from Sales to Marketing to Support Operations were conducted to understand needs and preferences in the new system
- After inventory of all components was taken and items to be converted were finalized
- All buttons and actions were converted to ensure they were working correctly in the lightning framework
- Visualforce pages were converted by applying Lightning CSS to give everything the same look and feel
- Page Layouts were consolidated into multi-tab layouts as well as utilization of the 75/25 split screen capabilities in Lightning
- A custom lite version of the Knowledge component was recreated as a custom lightning component and placed in the 25 percent split section of the layouts. The component makes API calls to Oracle knowledge to dynamically populate and display results in real-time.

Additionally, due to the complexities of Riverbed's existing system architecture, conversion from Classic to Lightning includes several iframes, custom buttons and Visualforce pages that see through to other enterprise systems in place. These will all need to be addressed to ensure that they can be used effectively after the transition to Lightning.

Lastly, to add additional value to the conversion, layout changes need to be processed and a custom lightning component will need to be created for a Knowledge section. The layout changes allow the large array of user groups to be able to perform all current functions in a more efficient manner. Creation of the custom lightning component has the intent to allow easier access and utilization of knowledge articles for support representatives handling cases.

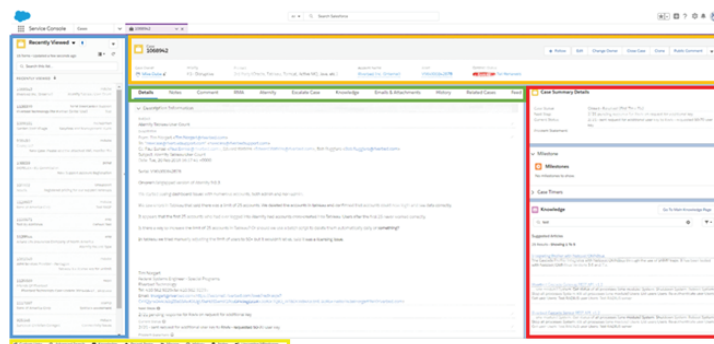
Overall, the need to reduce creation of new technical debt as well as utilize the new features and UI of Salesforce Lightning in the most efficient manner were the challenges that were presented.

The Solution

Project Scope Focused on Converting Existing Functionality

Riverbed and Jade Global worked closely together as one team to successfully convert all Salesforce processes from SFDC Classic to Lightning. Throughout the process several in-depth interviews were conducted with a variety of teams that ranged from Sales to Support operations. These interviews allowed Jade Global to identify the pain points that users were having in classic and allowed us to address the high priority changes that not only enabled the organization on lightning but configured the environment for a more intuitive interface that allowed users to conduct business efficiently.

Out of the box capabilities of Salesforce lightning were stressed on as being the front-line solution to any business needs with customization or creation of custom components as a secondary solution only if OOTB solutions were insufficient. Riverbed's systems (like many developed SFDC organizations) contain many fields, sections, record types, page layouts, actions, buttons, approval processes, workflow rules, triggers and more. The large challenge was to not only ensure that all these components were able to continue to perform but to allow users to find them faster and be able to get through business processes in reduced timeframes. To do this, several changes were made to page layouts to compartmentalize these pieces of information into a tabular interface as displayed in the example below:



■ Highlight Panel gives access to key information quickly.

■ Search List Views for records without leaving a record detail page.

■ Tabular Layout for information reduces scrolling time.

■ Customized bottom tray allows for easy access to other functionality

■ 75/25 Screen Split option allows for easy access to critical information

* Image intentionally blurred to protect any identifiable information

Additionally, the ability to utilize more horizontal space in Lightning allowed for the ability to add additional relevant components using the 75/25 split screen option. Salesforce Lightning Service Console allows for the use of a bottom tray to add additional functionality such as custom links, upcoming milestones and more.

The Benefits

- New SFDC lightning features such as Kanban Views, Lightning Reporting, Lightning Service Console and more became enabled for the entire organization
- Mobile compatibility was enhanced as SFDC Lightning is a mobile friendly platform
- Overall refactoring of layouts and components allows all users to reduce the amount of time needed to complete a business use case.
- Responsive and analytics UI created a better user experience
- Aligns Riverbed to be able to utilize and future release features that come to SFDC Lightning from Salesforce
- Aligns Riverbed to utilize Lightning enabled AppExchange solutions

Business Value Delivered

The Modernized Salesforce Experience

Prior to the conversion of Riverbed's systems to Salesforce Lightning, the system was in a state where any further development, enhancements or functionality that would have been created, could be termed technical debt. By converting over to the Salesforce Lightning platform, Riverbed eliminates maintaining 2 different architectures with Salesforce Classic and reduces overall spend and increases velocity for business priorities.

Additionally, the enhanced user interface that comes with Salesforce Lightning allows Riverbed users to be able to find and understand information easily as well as allows them to perform all necessary business functions in reduced time, with added responsiveness. The overall impact of this initiative allows for a shorter resolution time for support operations as well as a reduced Lead to Cash timeframe for Sales users. All AppExchange applications / packages that are Lightning compatible or that have been primarily designed for use on Lightning also move along for a better user experience. As time goes by, more 3X a year releases become generally available and Salesforce Customer Success teams and Product Managers will move into new features in Lightning only roadmap. This product focus on Lightning will enable Riverbed to leverage best practices, re-envision business processes, and reduce overall TCO in CRM.

Jade Global would like to thank Riverbed, its business teams, IT leaders and our program sponsors for trusting Jade Global to be their Partner of Choice. Riverbed continues to embrace a bold, new future focused on providing the best possible experience for Sales and Customer Success teams.

About Jade Global

Jade Global provides enterprise business application implementations, integrations, software product engineering, Cloud services, technology advisory, testing, and managed services across diverse industries. We are headquartered in San Jose, California with U.S. offices in Philadelphia and Los Angeles. Jade Global is an Oracle Platinum Cloud Select partner, Salesforce Silver Partner, ServiceNow Silver partner, Dell Boomi Certified System Integrator Partner and Microsoft Gold partner. We have additional strategic partnerships with NetSuite and Zuora. Jade has been recognized as one of the fastest-growing companies in North America by Inc. 5000 and was featured on the Fastest Growing Private Companies list in the Silicon Valley Business Journal.

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