

Upgrade your CRM Salesforce Classic to Lightning Migration 101

 Drive Digital Adoption



Upgrade your CRM: Salesforce Classic to Lightning Migration 101

Powered by Whatfix for Improved Adoption Rates and Productivity Gains

For the last 20 years or so, Salesforce has been (arguably) one of the most powerful, customizable and scalable CRMs on the planet. And as with most technology vendors that have stood the test of time, Salesforce also believes in devising new and creative solutions in response to changing market and user needs.

It is this spirit of innovation that led Salesforce to, four years ago, launch its signature CRM in a new and improved avatar - called Salesforce Lightning with better collaboration features, app ecosystem, and an intelligent assistant. Not to mention higher productivity for end-users, admin and developers!

But when it came down to Salesforce Classic to Lightning migration and user adoption rates, Lightning was not seeing the traction everyone expected it to achieve. In fact, according to the 2017 SFA Magic Quadrant report implementation and adoption of Lightning Experience has been something of an issue.

The reason for the low success of Salesforce Classic to Lightning migration was simple - Lightning posed to the user a foreign (and thus uncomfortable) experience. This made them want to revert to the familiarity of the original Salesforce platform (now called Classic) -- because humans are such creatures of habit!

You must remember what it was like when the Windows 10 OS was launched. Most people still wanted to stay with Windows 7, because they were so much more confident using it. But eventually everyone moved on, for they knew that Windows 10 is where the upgrades, innovation, greater customization and better security is at. Similarly, Salesforce Lightning Experience (LEX) is the future - there is no getting away from it.



It is just a matter of 'when'.

What's in it for your Organization?

500+ out-of-the-box features, along with improved end user experience, that supercharge user productivity are available only on Lightning - a big plus point. According to a Salesforce survey, some of customer favourites features range from Console apps, Lightning dialer, Chatter streams and Enhanced search to Lightning reports and dashboards.

Businesses feel that Lightning offers the following critical value propositions:

- Increased Productivity
- Increase in collaboration
- Reduction in time spent on managing sales pipeline
- Faster reporting and data validation
- Reduction in time spent standardizing processes
- Increase in win rates



We think these are pretty swell benefits. Where do we sign up?

But, it's understandable if you are still undecided about whether to migrate to Lightning. Often-times what can tip the scales is empirical evidence that demonstrates real ROI from making the switch.

For instance, it was reported that Deloitte, the multinational professional services network, made the switch to Lightning and reported a 25% increase in adoption rates! On the other hand, retail entity Sam's Club saw a 100% hike in memberships YoY post the Lightning migration - by transforming member experience. Talk about delivering 100% bang for the buck.

57% of organizations say that integrating key digital technologies is critical to enabling their digital business. However, turning this priority into a reality is grim when you look at the current state of What's more, according to a Forrester research, migrating to Lightning offers the following benefits:

41% improved productivity led by optimized user interface

- Sales productivity benefits of \$1.59 million (over 3 years) owing to better user experience
- Power user productivity benefit of \$365,815 thanks to improved dashboard capabilities and analytics

\$1,242,487 in savings owing to lower development and support costs, as Lightning lets users

- Customize without writing code
- Reuse base components for different channels (say mobile)
- Deploy applications 50% faster

Savings of \$169,106 owing to a reduction in developer turnover rate - Lightning offers better developer engagement

341% hike in ROI - you read right! Though it must be noted that the sample size for this research was just seven organizations.

And the best part is the cost of migration is earned back by Lightning, in the form of greater cost savings and productivity, within just 14 months of deployment.

Such a snapshot of tangible benefits are a great way to prove to your senior management that migration to Salesforce Lightning is the way to go.

So, Should you Opt for Salesforce Lightning Migration?



Salesforce recently made it clear that they will release new updates only for LEX (read: Classic appears to be just months away from complete retirement). So, if you want better responsiveness and a more flexible UX, then consider a Salesforce Classic to Lightning migration. Easier said than done, though. The transition can end up being a time and effort-intensive process, depending on your company culture and size.

Since the Lightning and Classic UI are as different as chalk and cheese, there is a learning curve in getting users comfortable using the former. Remember, it's a big adjustment to make for all stakeholders and requires significant investment in their digital dexterity.

You may have recruited the best salespersons, but if they don't know how to optimally use Einstein analytics to predict future leads, then your business is losing out on opportunities. So, you can imagine how a poorly managed migration would spell `p.r.o.d.u.c.t.i.v.i.t.y s.l.u.m.p.`

This is why you need to invest in structured change management efforts and real-time user training, via Digital Adoption Platforms (DAPs) such as Whatfix ([click here for a demo](#)).

Roadblocks in the Migration Journey

As with any technology upgrade, there is the good, the bad and the ugly. Sure, Lightning is the most powerful Salesforce UX yet, but if the migration is not planned well enough the organization could face significant disruption in user productivity.

Too much customization: Most organizations (and maybe even yours) have been using a heavily personalized Salesforce Classic UX. This includes everything from custom code to custom objects. But if the team in charge of the transition to LEX doesn't have a real understanding of the business or

pay attention to details, then many of the essential Salesforce features end up getting missed out. Also, some of the customizations may end up not working on Lightning at all - ultimately affecting user experience.

Lack of proper need analysis: It is likely that 20% of the objects on Classic is where your users spend 80% of their time. But in the eagerness to embrace LEX, we end up trying to focus efforts to deploy all the new features. This will result in improper implementation of the features, leading to drop in productivity.

"Where did it go" anxiety: Thanks to Classic, users tend to be already familiar with the basics of Salesforce such as converting a lead and submitting records for approval. But what they feel very uncomfortable with is navigating a whole new UI and trying to figure out where on the platform you can perform the old tasks. Apart from that, organizations are not able to extract maximum value from the LEX. Why? Because the cool new Lightning features many a times are ignored by users, what with salespersons just not having the time or incentive to experiment with the new buttons and dashboards. Deployed the latest Lightning upgrade? Your users are unlikely to care - reducing the effectiveness of the software adoption.

Complete buy-in end-users: Some organizations forget to consult and inform end-users of Salesforce before the migration. Big mistake. This leads to cognitive dissonance and dissatisfaction amongst the users, amounting to technostress and a drop in productivity. Since they feel like their views don't matter, they will be less inclined to adopt the upgraded tool.

These are very real challenges, but you can also afford to miss the boat on the future of Salesforce. Read on, as this ebook handholds you to ensure your company is fully prepared to make the switch to Lightning.

4 Steps to a Seamless Salesforce Lightning Migration



Clearly, the Salesforce Classic to Lightning migration needs to be a non-negotiable event in your organization's calendar. But, it is also quite expensive - \$764,860.

So, whenever you decide to make the move, plan well and plan ahead. This will ensure that the migration is a runaway success. It is possible to ensure a smooth migration to the LEX by investing in the right research, planning, testing, and training - a complete Salesforce Lightning migration strategy.

Every organization is unique, and so there is no one-size-fits-all means to managing the Salesforce Classic to Lightning migration. But, here is a Salesforce Lightning migration guide to get you started on this journey. Feel free to adapt this Salesforce Classic to Lightning migration steps to your organization's needs.

1. Discovery phase:

Like every other Salesforce customer, you're probably thinking: "Will the new Lightning Experience suit my organization?"

To answer that very pertinent query, you will need to ask yourself a few more questions:

a. Does LEX have the same set of out-of-box features that your sales team regularly uses in Classic?

- Salesforce migration from classic to lightning should mean that users can continue to do their jobs as smoothly as they previously have.
- Find out from Classic end-users what features they depend upon the most in the sales workflow. Sometimes, only a subset of users absolutely need the Classic features. In such a scenario, you may choose to deploy Lightning Experience to the rest of the sales force using profiles or permission sets.

b. Can LEX be harnessed to improve ROI and sell smarter?

- If harnessed properly, LEX's new features such as more accurate pipeline reporting, performance charts, top deals, enhanced calendar and sales path can make selling so much more efficient and effective.
- According to the 2017 Lightning Adoption Survey, Lightning has increased productivity for users by 41%.

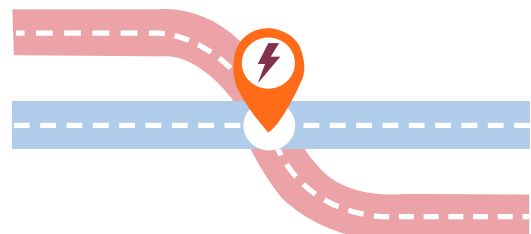
c. Are you missing out on real innovation by sticking with the Classic system?

- An audit and comparison of the features offered by Lightning and Classic will show you that the former offers 3x innovation than the latter.
- Still choose to stick to Classic? Then bring about innovation yourself by building your own apps or subscribing to third party app vendors

d. Is the opportunity cost worth it?

- Salesforce Classic to Lightning migration will mean investing time and money in retraining people and the actual migration of systems. It could also result in a temporary slump in productivity. Will the returns from migration from classic to lightning make up for this?

e. Does LEX match with your organization's technical and business roadmap?



- Chances are your organization has already invested in third party apps or customizations, for the next few years, that work only with Salesforce Classic. So, the question is with

such a considerable technical debt is it worth migrating to Salesforce Lightning right now or should you wait it out?

Or does your business have too many other commitments in the pipeline, that it doesn't leave room to focus on a migration from Salesforce Classic to Lightning?

Experian, a leading global information services company, put the 'decision' ball in the employee's court (so to speak).

Naturally, we wanted to move the needle considerably on end-user satisfaction. He also felt a real need for a shift in culture from

"I have to use Salesforce as an admin tool as it's part of my job" to "Salesforce empowers me to manage my clients and business the right way, helping me to better understand their needs and make me a more successful salesperson."

So, they ran a survey, across 150 users including Salespeople, Sales Managers and Sales Operations users. These users were asked leading questions that would help answer the bigger question of 'What needs to be improved in Salesforce Classic?'

Answers received ranged from 'improving page load speeds' to 'reducing clutter in the Salesforce UI'. And thus, the need-gap was identified.

Most organizations also run Salesforce's in-built Lightning Experience Readiness Check to better evaluate if LEX meets their organization's specific needs. Then you can perform a gap analysis to see if LEX can match these offerings.

It can also help you map compatibility and code issues. Best of all, the report will tell you exactly what issues need to be fixed before choosing to migrate Salesforce Classic to Lightning.

2. Convince leadership

To ensure that there are no disruptions in the migration due to objections around budget, timing, and implementation - get executive buy-in early on.

For this, you need to present a strong business case for LEX. Show the top brass what real value it can deliver.

For instance, post the user survey, we at Experian

realized that most of the user demands could be met by simply migrating to Lightning. Why? Because Lightning's UX is more user-friendly, logical, intuitive and uncluttered, especially when it comes to page layout - taking it from hundreds of fields on one page (on Classic) to just a dozen or so. Also, Lightning's Kanban board views had the potential to simplify the moving opps through the 5 stage-long complex sales process.

These very clear benefits acted as the catalyst that sealed the deal on migration to Lightning for Experian.

Such clearly outlined benefit-propositions would leave the bosses (particularly sales leadership) with just one question: 'Where do I sign?'

In case you need some help in making your case, Salesforce has a very convincing 'Lightning pitch deck' and even demo scripts.

3. Planning phase

Planning for the migration is by far the most important step. Much like a traditional project plan, your migration plan should also have timelines, outlining of responsibility, and milestones. And since I believe that lists make everything better, here is one with that features basic steps in planning for migration to Salesforce LEX:

- **Set SMART transition and adoption goals:** To know if your transition to the latest Salesforce edition is a success, you need to first set Specific, Measurable, Achievable, Realistic, and Timely (SMART) goals. They can range from improving productivity and reducing the number of support tickets from sales reps to improving data quality, sales leads, opportunities and new account creation.

 Some of the KPIs that would help you reach these goals are:



- **Transition adoption metrics** – Time taken to successfully complete an action or goal with Classic, daily active users, number of users switching to Salesforce Lightning etc
- **Post-transition productivity metrics** – Time taken to successfully complete an action or goal with LEX, increase in calls logged, lead conversion rate, etc

Once KPIs and goals are set, institute a dedicated Salesforce migration taskforce to drive these goals.

In the case of Experian, there was whole-hearted participation from all members of their global sales excellence team – from Business Analysts to internal Salesforce Development team, Training team and CRM Support team.

Devise change management strategy

Salespersons are known to be quite picky about the tools they use, while also being too technically savvy. So, if you were to suddenly change Salesforce versions with such end-users, pandemonium would ensue. And the migration is doomed to fail from the start. That is why you need a well-structured change management plan.

a. Since the salespersons perform a critical function, i.e bring in new clients (and therefore money), it wouldn't bode well for the company to not shock or displease them. So, ensure that you set their expectations about life after the migration; early on by.

b. Surveying the Salesforce power-users to understand what features they are most thrilled about from the LEX bouquet and what concerns they have about your current Salesforce platform.

c. Mapping out how the sales workflow and activities will change with the new Salesforce.

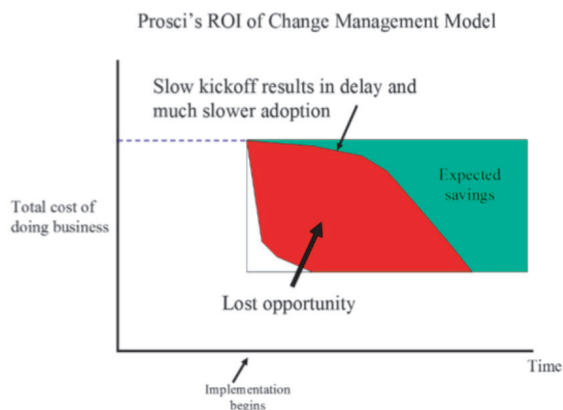
d. Tailoring your communications strategy and adopting consistent messaging, according to your assessments, to explain to users why Lightning is the better option. For this, here are some of the marketing tactics you could implement:

- **Participate in internal forums:** In these forums, or 'chatter groups' as its called in Salesforce, users can discuss the migration freely. And members of the Salesforce migration taskforce can address concerns or queries relating to the migration. Any feedback shared in the early stages can even be incorporated during the implementation of LEX. Keeping channels open for two-way communication will make the users feel involved in the decision-making process.
- **Plan an emailer campaign :** Promote the many benefits of the Lightning Experience and show users what's in it for them through various emailers. These email chains could explain the reason for the migration and also outline the different stages (timelines) of the change.
- **Build Accountability:** To build accountability, ensure that users are clearly mandated (through various communication tactics) to only use Salesforce LEX to execute sales tasks. Through the Whatfix DAP's onboarding overlay widget, you could even play a welcome video (maybe featuring the sales head or CEO) as soon as users open the new Lightning platform. This video could further reinforce the benefits of using the new CRM. And such a top-down directive can go a long way towards improving onboarding.
- **Host a launch migration party:** Let users know that the migration to Salesforce LEX is nothing to fear, instead it is a cause for celebration! Plan a cracker of an event that is upbeat and showcases how happy and proud your organization is about making the switch. Live Salesforce Lightning demo and Lightning themed cupcakes and photo booth anyone?

Excellent change management makes it 6x more likely to meet project objectives while also improving on savings. So, make this stage count.

Run trials of Salesforce Lightning:

In the Salesforce Sandbox environment, run trials of customized features with performance testing, load testing, and staging. You can even adjust existing customizations to work in Lightning Experience. This testing environment will ensure that bugs are removed before the launch, without affecting the actual Salesforce data and configuration.



Phase the rollout:

You do not have to migrate all users, across your organization, at the same time to Salesforce Lightning. In fact, the mark of a successful migration is that it is an incremental and well-defined process. It would also be wise to start migration with a pilot group of hand-picked users, especially for large organizations. Find out what works for the select users and then tweak the platform before rollout. Once the pilot is a success, you can get down to migrating each and every function in the organization.

How you do this is: First, take stock of all the functions that use Salesforce such as sales, operations, back-office, customer service and marketing. Then, identify which of these users would it be easiest to migrate. Once they are successfully moved to the new system, start on the next group. You could even recruit the Lightning 'converts' from one function to guide the others on how to use the upgraded tool!

Though the Experian team was stretched for time (with only 3 months to the go-live date), and therefore couldn't run pilot sessions, they did regularly expose power users to LEX instances at various levels of customization pre-launch. They also phased the roll out, with Lightning users in UK&I, EMEA and North America gaining access in 2019.

And Experian's APAC and LATAM user community are expected to go-live in March 2020.

The implementation was staggered primarily because it made it easier for the our migration taskforce to manage such a large scale project seamlessly.

4. Implementation, training and onboarding:

You have started the transformation and change management program with a bang! Great! Now, be proactive in training salespersons to use Salesforce LEX. Create user personas and flesh out individualized 360 degree training approaches that cover different training tactics, tools and timelines.

Here are some big Salesforce Classic to Lightning migration challenges that you will need to overcome through training:

- **Lack of awareness:** There are several functionalities that Lightning lacks vis a vis Classic and vice versa. So the learning curve is steep with this new version of this complex tool.
- **Users are always one step behind:** Salesforce constantly rolls out updates, often three per year. This requires the users to be constantly retrained. Salesforce does offer release notes to understand the new features, but they tend to be quite long and technical to consume for the average user.

'Training in the flow of work' - a mix of micro and macro learning - is the best training format for software migrations. And here are the most important training elements to adopt:

- **Traditional training techniques:** Use your LMS to disseminate longer pieces of training in the form of presentations, pdfs and videos. This is great to help users see the bigger picture to promote onboarding, by highlighting the broad changes and advantages that Lightning will bring to the sales workflow. You could also employ classroom training, handouts and the like to set the foundation for using Lightning. But this will prove to be too time consuming, inaccessible and really expensive.
- **Informal training:** Salesforce's Trailhead platform strives to make learning fun and engaging with its quests, quizzes, badges and guided learning paths. It has recently also

introduced Salesforce walkthroughs that help users navigate the CRM as they use it. There are several other third party applications, called digital adoption platforms (DAPs), that also aid users to learn as they work on Salesforce LEX. This leads us to the next pointer.

- **On-demand learning:** ‘What does this new form do?’ or ‘where did that button go?’ are common questions that regularly pop up in the case of a refreshed Salesforce system.

The most effective way to offer Salesforce LEX training (that deepens understanding and aids in retention of information) is through DAPs such as Whatfix (request a demo). It allows users to practice using the CRM in its live environment, with contextual, automated and bite-sized lessons.

Here is a quick summary of some of the salient training features of Whatfix

Responds to queries and concerns as they arise via:

- Tooltips that lets users know what each feature/button is for
- Self-help widgets that provide contextual help documents, videos etc

Offers interactive step-by-step walkthroughs (flows) to help with onboarding. It will offer highly-segmented guided tours on ‘how to’ create new opportunities and setting up user profiles in the new system etc.

Groups related walkthroughs and encourages continuous learning with its Tasklist feature. This is a mini learning management system, within Whatfix, that complements your existing LMS.

Alerts and announcements relating to the migration can be scheduled in advance

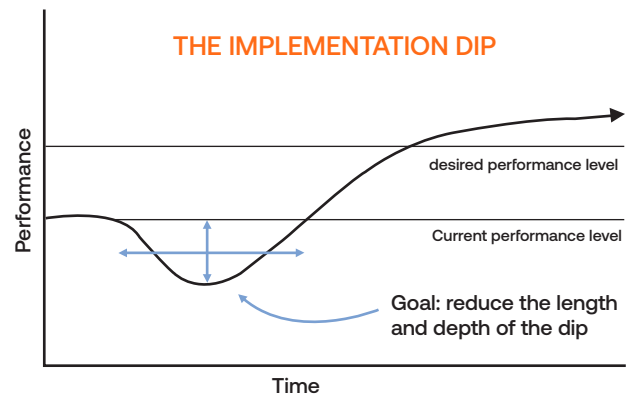
Automatically produce training content in different formats (pdf, videos and slideshows) to cater to any learning style

Maps how the CRM is being used, with superior data analytics, in order to create the right learning content for your sales reps

Notifies users of any new updates to the Lightning CRM. Whatfix beacons (to draw peoples’ attention to new features) and smart pop-ups with navigational messages will then train users on the latest release.

This way, your users know the exact steps needed to complete the task on the CRM without losing out on productivity (owing to lack of commitment and doubt in the adoption process). And this will help escape the dreaded Change Valley of Death or implementation dip.

Leverage power-users or change champions: Work with the Salesforce migration taskforce to identify a group of super users who are truly passionate about the Salesforce tool. Then, give them early opportunities to train on the new technology. Once trained, you can employ them as change agents and have them train other users.



Experian's Tryst with Training Users for Lightning

For Experian, choosing Whatfix to circumvent the ‘How to use Lightning?’ assistance requirements of end users was a simple decision, given that it was already performing the same function with Salesforce Classic.

But the biggest challenge faced by the organization's training team was that they had only 3 months to prepare for the Lightning launch, and:

- Since the migration was staggered, there would be two instances of Salesforce running for which training had to be managed.
- Salesforce Lightning was new to not only the end-users but also to the global sales excellence training team at Experian. So, the latter had to first understand the differences between the Classic and Lightning UI before they could create new content using Whatfix

At Experian, we had 4 trainers who were tasked with training 3000 Salesforce users across different regions. This made it near impossible for these trainers to conduct face to- face training or webinars, or pick up the phone and answer each user's query.

Beating all these odds, here is how Experian successfully onboarded its users on to Salesforce Lightning:

Ensured that the final Lightning instance was ready ahead of time – This way, the training team could prepare the relevant Whatfix content by the go-live date. We even effectively managed Whatfix content, for Lightning and Classic, by segregating it on a Zoho content management database.

Empowered power users: At Experian, we decided to initiate onboarding with a light-touch ‘Train the trainer’ approach. The migration taskforce trained the right sales operations users, in different regions, on how to navigate Salesforce Lightning. These influential users were then expected to help other users, within their respective geography, in their time of need.

Readied onboarding messaging – Orientation sessions that focused heavily on encouraging users to take advantage of ‘Guide Me’ (Experian’s internal branding for Whatfix) were conducted. This was aimed at getting users comfortable with Lightning. The session featured a 4-point guide on where to go for Salesforce assistance – starting with ‘use Guideme widget’ and ending with ‘contact your local trainer (or power users)’.

Harnessed Whatfix to –

Identify and establish a TaskList for users, consisting of eight walkthroughs (flows) to

- help familiarize them with the Lightning UI, from the day of the launch. The image below will give an idea of how the TaskList appears on the platform:

Create a custom ‘Welcome Mat’ to replace the generic Salesforce one. This was more personal to our users and the company’s heavily-customized instance of Salesforce. The image below is what it gives an idea of what it looks like:



Items included in the welcome mat are:

1. Launch video showcasing key features (two-minute long)
2. Three linked ‘Basic Navigation’ related flows
3. Where do I go for help? -- A linked document explaining the assistance matrix

5. Outcomes and Optimization phase:

Post the Lightning implementation, sales leaders and Sales Excellence Directors at Experian began placing greater emphasis on improving Data Quality Scores. This symbolized a huge shift from the pre-Lightning period. And it is, in itself, a pay-off of this migration effort.

Also, feedback from users (via an End User Satisfaction Survey) was very positive overall. Our employees actually prefer working with the Salesforce Lightning UI over Classic.

He added that in the future they hope to track metrics that help gauge the acceptance of the new software, such as:

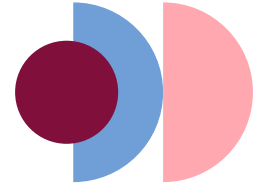
- End user satisfaction survey scores and comments
- Ongoing data quality analysis for potential improvements
- Ad-hoc feedback received through cases
- Ad-hoc feedback received via Whatfix
- Proactive engagement with Regional and Country stakeholders to understand ongoing end user pain-point

If you would like to be more thorough, make sure you check if you are meeting the migration and adoption goals that were set at the beginning of this guide. Via Whatfix’s usage analytics or embedded surveys, you could even gauge which Lightning functions are being used, what queries users have etc. Then, you may personalize Salesforce LEX training content to further improve adoption rates.

Remember, Salesforce has a ‘switch to Classic’ button. So allow your users to move between the two versions, until they are comfortable with Lightning. Then, turn off Salesforce Classic for your organization and call the transition a wrap!

But what is most important is to sustain the training efforts and keep the accountability alive, or your users will just quit using Salesforce (be it Lightning or Classic) all together and get back to their excel sheets.

Why Choose Whatfix for your Salesforce Migration?



The crux of using a DAP to support your migration efforts is this - making sure the sales productivity ball doesn't ever drop. A smooth migration is guaranteed with Whatfix's arsenal of widgets that are contextual, interactive, real-time and autonomous. Here are the top 5 reasons Whatfix would be the perfect platform to support your IT and sales team when choosing to switch to Salesforce Lightning:

1. Adoption Everywhere: The single biggest issue during software migration is poor user adoption. Whatfix drives user adoption of applications, everywhere your users are in the enterprise - be it In App or Outside the App. Whatfix's Adoption Everywhere capability enables the right content, in the right format, at the right time, for each user, everywhere. Whatfix's Adoption Everywhere capability enables exchange and auto update of multi-format content, outside the app with LMS systems in a SCORM and xAPI compliant manner, and also with Content Repositories. It also enables Content Aggregation of pre-existing content in Outside App Destinations inside the Application via Whatfix Widgets. Adoption Everywhere ensures that Content is omni-present in the enterprise and available for any user at their moment of need. Users can start a flow in one application and end it another - be it web, desktop or mobile, without friction. Customers can reach the enterprise across any sales and marketing channel- be it chat, call or community.

2. Smooth Change Management: Whatfix helps users make a smooth transition to the 'new way' of selling on Lightning, complete with executive communication, alerts (via beacons), as well as personalized user training. In this way, it guides users to high-value features and changes to boost productivity and reduce disruption. What's more, compliance can be assured by hand-holding users about changes and continual reinforcement. Also, Whatfix is capable of measuring the impact of user adoption of Lightning via its analytics feature.

3. Open Ecosystem: Enterprises deserve to leverage existing systems and have the flexibility to use best of breed systems - without their DAP provider



forcing their own systems (e.g. LMS, Session recording). Whatfix fosters an open ecosystem by integrating with the highest number (50+) enterprise technologies like analytics tools, chat tools, chatbots, knowledge bases, LMS, survey and session recording tools.

4. No-code Deployment and Maintenance: Authors can start building flows on Salesforce Lightning from day #1 without any coding or technical skills. Various formats of content can be auto-generated and auto-published and made available to users based on their in-app location, role, user attributes and app-specific parameters. It also offers no-charge onboarding service for the first roll-out.

5. Interactive and Autonomous: Apart from being easy to deploy and implement, Whatfix promotes learning by doing, within the Lightning application and in real time. Unlike traditional training, Whatfix content is dynamic, giving users a more interactive means of learning. It also tracks training efficiency and offers insights that could speed up the learning curve.

6. Exceptional Customer Service: Whatfix customers report the highest (i.e. 100th percentile) customer satisfaction in the Software industry through Net Promoter Score of 65. Did you know that Whatfix has

been consistently ranked as a Customer Satisfaction leader in the G2 Grid for Digital Adoption Platforms for the Enterprise segment? The adoption platform's customer care is really responsive and takes only 1/5th the waiting time of the closest competitor and reduces support costs by up to 60%.

7. TCO and Security: Whatfix is used by Fortune 500 clients across the globe. We are ISO 27001 and SOC 2 certified, and GDPR compliant. In compliance with regulations, we do not capture unnecessary data on the users. We help companies measure the effectiveness of their content in driving application adoption and provide insights into how content could be improved.

CONCLUSION

The Final Word on Salesforce Migration

Granted, it is a challenge to expect users to step out of their comfort zone and use a new version of Salesforce. But by responsibly and strategically going ahead with the Classic to Lightning migration, you can be assured a future of uninterrupted sales workflows.

Not to forget, the improvement in quality of leads, collaboration, management of sales interactions; quicker approval; and more intuitive reports and dashboards.

