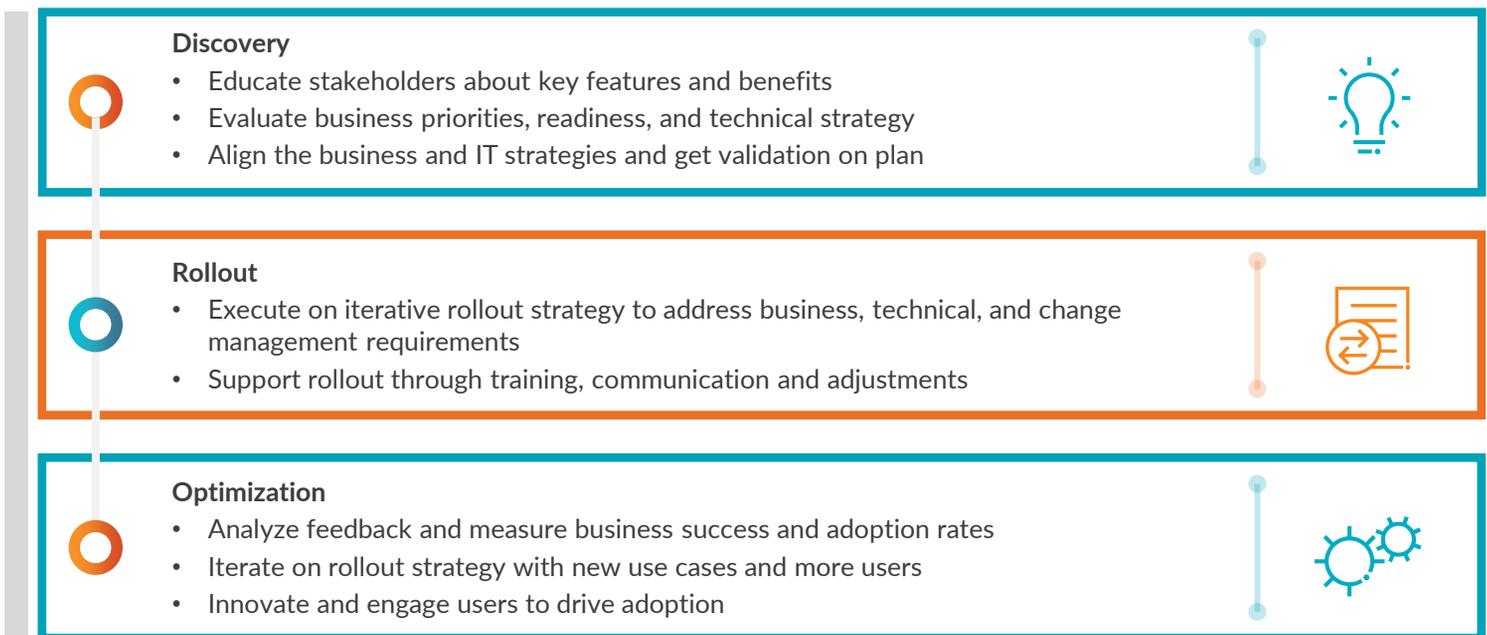# Salesforce Lightning Migration Journey

Effectively Migrate from Classic to Lightning

Protiviti's Classic to Lightning Migration Journey is designed to help companies execute their migration goals while supporting user adoption and ensuring that the underlying systems are operational, secure and effective. **We do this in three phases:**

Discovery
- Educate stakeholders about key features and benefits
- Evaluate business priorities, readiness, and technical strategy
- Align the business and IT strategies and get validation on plan

Rollout
- Execute on iterative rollout strategy to address business, technical, and change management requirements
- Support rollout through training, communication and adjustments

Optimization
- Analyze feedback and measure business success and adoption rates
- Iterate on rollout strategy with new use cases and more users
- Innovate and engage users to drive adoption

Discovery Phase

Planning and Design: The initial scoping/awareness phase focuses on collaborating with key stakeholders to drive awareness and identify processes for migration, which are assessed and prioritized into the rollout strategy.

Stages	Plan	Evaluate	Design	Validate
Details	• Outline timeline and expectations • Identify core group of stakeholders	• Conduct detailed walkthroughs • Assess readiness through technical analysis.	• Develop rollout and change management strategies	• Validate plan to gain strategy alignment
Deliverables	• Host Workshops • Business Process Document • Gap Analysis Checklist • Business Requirements (if needed) • RACI Chart		• Host Validation Sessions • Importance/Difficulty Matrix • High Level Solution Designs • Prioritized rollout project plan • Change management strategy • User personas	

INNOVATE. TRANSFORM. SUCCEED.

Salesforce Lightning Migration Journey

Rollout Phase

Agile Implementation: Building upon the work performed in the Planning & Design phase, the second phase focuses on rolling out the Lightning Experience to users.

Stages	Prepare	Implement	Adjust	Launch
Details	• Identify and work iteratively with a champion within each stakeholder group • Prepare users for the rollout	• Deliver the rollout following agile/scrum methodology to ensure alignment with the business and IT	• Provide forums for end users and stakeholders to communicate, collaborate and provide feedback	• Roll out the Lighting Experience to each user group according to plan • Provide continued support
Deliverables	• Rollout of the Lightning Migration per plan • Test scripts • Support the roll out with hypercare		• User and training documentation • Feedback intake • Weekly status reports	

Optimization Phase

Adjust and Support: In the Post Go Live phase of our Lightning Migration Journey, Protiviti provides hypercare support and additional training after the rollout.

Stages	Measure	Support
Details	• Track user adoption • Measure success of the migration	• Monitor feedback and behavior through established channels • React and prioritize adjustments, new enhancements or address issues.

Rollout Approaches

Each project and client is different, so discovery is imperative to properly plan the rollout approach that fits your organization.

	Big Bang (Org Based) Rollout Lightning Experience to all users in your organization at the same time.	**Phased (Persona Based)** Rollout Lightning Experience gradually, in groups.	**Hybrid** Lightning Experience rollout can be tailored to your needs.
Pros	• Consistent user experience for all users • Fastest (less expensive) implementation time • Less change management, sharing communication, learning and enablement activities	• Lowest risk approach • Implementation process improves after each rollout (we learn as we go) • Change management more manageable • More focused training	• Flexible to meet needs, (e.g., Big Bang upfront with main groups, then following up with remaining phases) • Less risky than Big Bang, not focused on one big rollout
Cons	• Highest risk approach • Difficult to roll back changes • Training and support more critical • Complete testing across groups is critical and may be difficult (working within the same timelines)	• Longer implementation timeline • Higher overall costs	• Riskier than phased, fewer rollouts • Longer, more expensive than Big Bang

protiviti.com   Bob.Santos@Protiviti.com   tcblog.protiviti.com

Contact us to schedule your migration at bob.santos@protiviti.com

protiviti®
Global Business Consulting