

# Lightning Experience Rollout Checklist

This checklist is part of the Salesforce Enablement Pack that's part of the Lightning Experience Rollout Trailhead module, another great place to learn more about operating Salesforce.

## EDUCATE YOURSELF ABOUT LIGHTNING EXPERIENCE

- Complete Lightning Experience trails on Trailhead
- Watch Lightning Experience videos
- Get hands-on practice:
  - Use the Migration Assistant Preview and Readiness Check
  - Enable in sandbox
  - Enable in production for yourself (permission set)
  - Enable in a free developer edition
- Read the latest release notes
- Review feature comparison charts and decide when to migrate to Lightning Experience

## EDUCATE YOUR COMPANY ABOUT LIGHTNING EXPERIENCE

- Demonstrate benefits for key stakeholders
- Share Lightning Experience with your leadership team and key stakeholders

- Direct business users and colleagues to complete Lightning Experience trails on Trailhead
- Share feature comparison charts with your leadership team and key stakeholders

## CRAFT YOUR ROLLOUT STRATEGY

- Identify executive sponsor/project champion
- Identify super users
- Identify pilot group for Lightning Experience rollout (optional)
- Create communication strategy
- Create training plan
- Create project schedule with milestones and dates
- Identify measures for success
- Take a snapshot of current metrics (to measure before and after)
- Create a Chatter group for project team communication and collaboration
- Create a Chatter group for business users to ask questions

## EXECUTE YOUR ROLLOUT PLAN

- Activate your super users
- Direct users to Trailhead Lightning Experience trail for sales reps
- Conduct email drip campaign to drive awareness

## ENABLE LIGHTNING EXPERIENCE

- Visit the Lightning Experience Migration Assistant located at Setup | Lightning Experience for steps to enable

## MEASURE, MONITOR, AND ITERATE

- Create reports and dashboards to measure key metrics
- Conduct business user surveys
- Connect on a monthly or quarterly basis with super users
- Report out to executive sponsors