SUCCESSFUL LIGHTNING PROJECTS

We revolutionise the way people engage with salesforce.com and make it useful

Overview…

Improved Apps is ideal for Salesforce Customers who are embarking on any Lightning project. The Lightning user interface (UI) is a step-change from the Classic UI that users will be familiar with.

We are often told "All change is painful" and for sure, one of the biggest issues will be coping with the frustration of unfamiliarity for completing what should be familiar tasks. That said there are many good reasons to move to the new Salesforce UI, which has been built around customer requirements, and Improved Apps technology can make that move a whole lot easier.

"The migration can be de-risked and simplified by implementing Improved Apps now, in your Classic environment, great preparation for your Lightning go-live project. Furthermore, all your rich content, in context, persists from Classic to Lightning with no extra work."

Simon Thompson, CEO Improved Apps

This makes it easier for users to familiarise themselves with the look & feel of an embedded help solution, which utilises the Lightning design even for Classic users. When the switch to Lightning is made, all your Improved Apps Help Content will automatically be available in the new UI (also in mobile) without further effort. This means users will already know where to go to get help, which reduces lost time searching and greatly accelerates this learning and adoption of the Lightning environment.

Four key areas where Improved Apps can help

1. Training users in simple, bite-sized chunks, always to hand, embedded in the Salesforce App, with dynamic content and paths to learn more.

2. Change Management – Communicating, educating at the point of need and reminding users of functionality/process changes that affect their role.

3. In-app notification (with audit reporting) of policy/regulatory changes, which may have an impact on data entry and processes.

4. Drive continuous improvement utilising the interaction and sentiment data, gathered as users go about their day.

These four key areas form a continuous improvement cycle, starting from your Classic environment today, right through to your first Lightning enabled users. However, it doesn't stop there…

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The above diagram illustrates the continuous improvement cycle that is achievable with Improved Apps.

1. **App Changes** – Change – and ongoing change management – is inevitable for the enterprise today. External drivers for change conspire from all angles – social, economic, environmental, political and technological (including salesforce platform innovation) – to force evolution at an ever-increasing pace.

2. **Adjust Content** – Domain experts, process owners can all easily curate/modify explanations about any change, provide hints and tips of best practice, define why its important to do things in a new way, all at the point of need…and demonstrate the business is listening to employee feedback.

3. **Review Content** – Quality check, adjust, define visibility by role, market, language etc. and activate or approve.

4. **Target Comms** – Create a Notice, targeted to only the affected users, with information about the change and how it affects their role…Then monitor the Notice to see how users are engaging with that change real-time.

5. **Users Interact** – Users digest the relevant information, nothing is missed, they interact with the new help and training and acknowledge that they actually understand and can access easily from any device.

6. **Self Educate** – Users know where to access dynamic, rich, information at the point of need, enabling them to pick up best practice, hints and tips in context to the task in hand…Learning on the job, dipping in and out of help as and when required.

7. **Guidance** – Interactive 'Reading Lists' and page walk throughs provide users easy access to more structured learning, which is great when supporting larger changes or onboarding new users.

8. **User Feedback** – As users interact with the embedded help and training, they can flag if it was useful or not., or comment on content or pages. Authors of the content can ask simple questions at a very granular level to gather user feedback. No need for end user surveys!

9. **Audit & Analyse** – Utilising the knowledge of what is working and what isn't, through the packaged comprehensive reports and dashboards, enables your business to act on facts, and decide on any further changes.

Moving your businesses to a place where you can support continuous improvement and continuous learning…. Some Customers call this their 'Virtual Assistant'…'Self Help'.. Or their 'in-App Coach' to name a few…

More Successful Projects – Improved Adoption

We all have a history of projects that have been rolled out that didn't quite get the desired results… In most cases our users move very quickly from being optimistic about any change to being disillusioned then reluctant or un-engaged.

O **63% of CRM projects fail.** Poor Adoption is stated as the biggest cause
O After one month of go-live the following adoption profile is typical
- O 10% - Fully Willing and Able Users (Power Users)
- O 20% - Willing but Not fully Able (Aspiring Power Users)
- O 20% - Able but Not Willing (Reluctant Users)
- O 50% - Unable and Unwilling (Unengaged Users)

70% Reluctant or Unengaged Users

60% Power or Aspiring users

✓ After one month of go-live **WITH Improved Apps,** this profile is typical
- ✓ 40% - Fully Willing and Able Users (Power Users)
- ✓ 20% - Willing but Not fully Able (Aspiring Power Users)
- ✓ 20% - Able but Not Willing (Reluctant Users)
- ✓ 20% - Unable and Unwilling (Unengaged Users)
✓ Case Study: Qlik Technologies, Inc.

With Improved Apps embedded around all of your projects, providing the answers users need, when they need them, ensures that your optimistic users move into power or aspiring users. The analytics provided will help you decrease the number of reluctant or unwilling users.

So what can Improved Apps do for your company today?

The best example is a customer use case. These were the high-level requirements for Improved Apps at one of our highly regulated Financial Services Customers:

- **Embedded Help** – Provide useful help and guidance at the point of need, to encourage new Associates to have the right conversations with Customers and populate the right data in the right fields.

- **Field Level help** – Related training, help, links to suitable content (That works in Classic New, View & Edit Modes).

  - o Information lost in the Associates' hard-copy A4 notes folder? Put this valuable content online and guide users to the most critical content in context
  - o Three supervisors are 'Help Authors', close to the users, curating help & training as and when users need it.

- **Note Taking** – Provide easy access to template Customer responses (previously in MS Word), so Associates can choose suitable information to gain some structure and have more consistent conversations with their Customers. Placing this guidance on the Chatter feed page, puts it right where it's needed.

- **Call Button** – Give easy access to a recorded webinar, next to the 'Log a Call' button, for quick access and reminders of the training in context.

- **Link to Knowledge Base Articles** – Fast track Associates to the right articles, to save them having to remember names of Articles and stop them wasting colleagues time asking 'for that Article xyz…now what was it called again? Can you help me find it?…do you have a copy?'!

  - o Report on current usage, identify top used articles and where they were accessed from and if they were useful.

- **Monitor** – Report on all new Associates activity and engagement – Provide analytics reports and dashboards to oversee what is working and what isn't.

Summary

So if you are planning to move to Lightning, or have already started deploying users to Lightning, then perhaps its time we had a conversation. We can share how we can help ensure your projects and Lightning migration are a glowing success. After all, no one likes to see pockets of failure (because of poor adoption and disillusioned users), or worst still complete failure, as users just don't see any increased value with the new changes or Lightning interface.

Improved Apps have helped many salesforce Customers successfully move to Lightning. The best time to engage us is now, so that we can help you weave success into each and every one of your current and future projects and help you move into continuous improvement mode.

The successful companies will be the more agile, more customer-centric and more innovative, who learn from their mistakes and drive continual improvement.

'Success is...delivered by success'…'Success is...magnified by success'

IMPROVEDAPPS

Sharing knowledge for shared success

"Improved Apps – Improved Help and Improved Noticeboard – will be a game changer"
Alicia Walters, Kerry Inc. - CRM Global Data Lead

"We were able to roll out the first version of this
to our global users after a couple of days"
Ulrika Grahn, Qlik - Senior Global Operations Training Manager

"I'm now confident that our Salesforce users get the help that they need"
Sam Cobley, Alere Toxicology – Online Development Manager

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