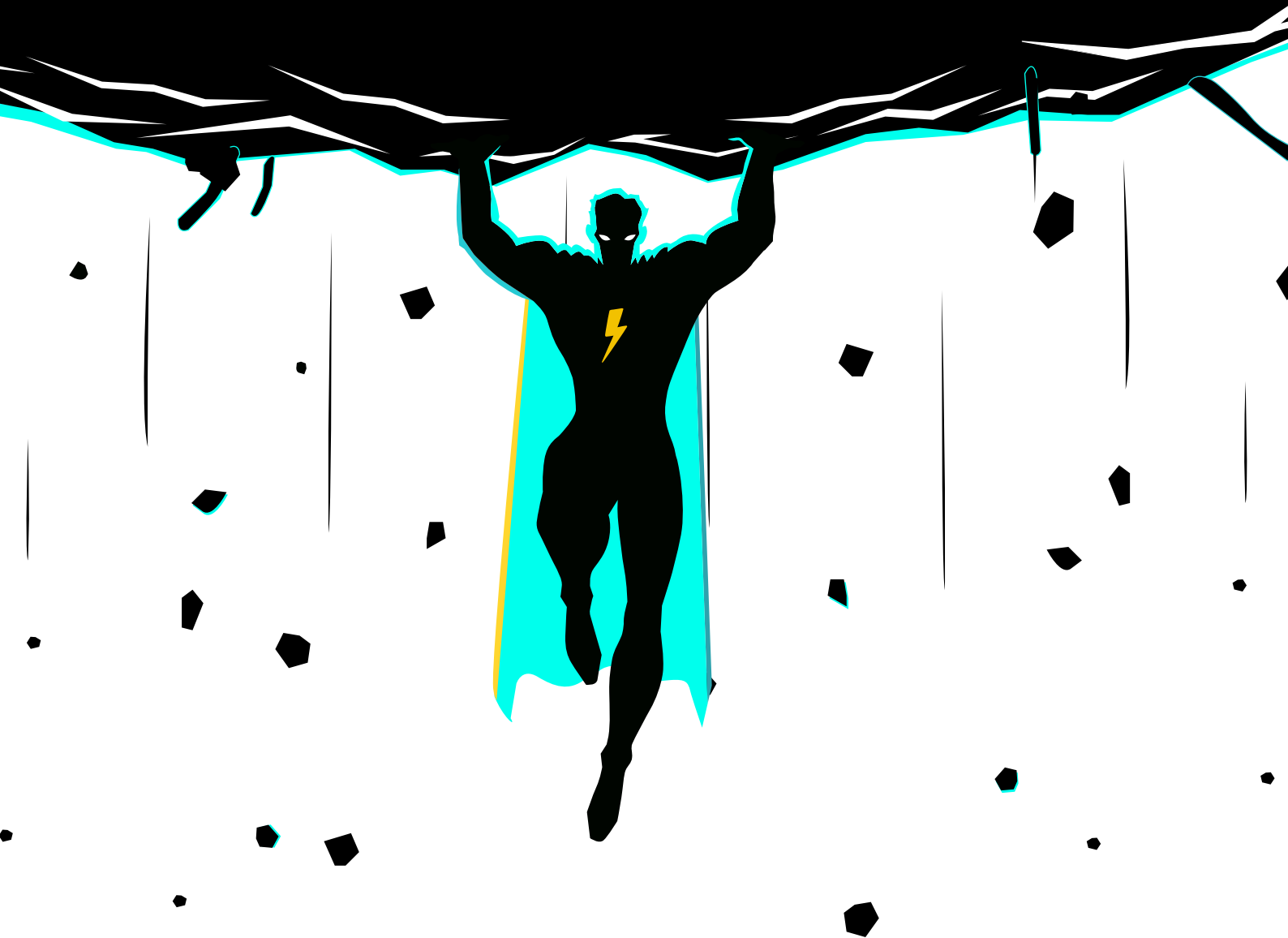# Tips & Tricks for Optimizing Salesforce Lightning ROI

Improve Efficiency for Sales,
Marketing & Service

O Panaya

# What's Inside?

Living the Lightning Promise

We're coming up on the 5-year anniversary of Salesforce Lightning. Do you remember when it was first launched how daunting it seemed? After all, old habits are hard to kick. Salesforce Classic was burned into the fabrics of most administrators. We could all navigate it as if it were our own kitchen.

But after the hurdle of moving from Salesforce Classic to Lightning, many have learned to not only embrace the change but thrive. Take a note from Mike Martin, Salesforce MVP and Chief Customer Officer at 10K Advisors, who said:

> *The migration to Lightning isn't just a migration. It's an excellent opportunity to revisit existing workflows and processes, reviewing capabilities, and matching the new functionality to the needs."*

Salesforce Lightning has brought so many amazing innovations and even better experiences for administrators and end users. It can be hard to navigate it all, which is why we have put together some of the best tips and tricks on making the most of the Salesforce for Lightning Experience.

Lightning Tips & Tricks

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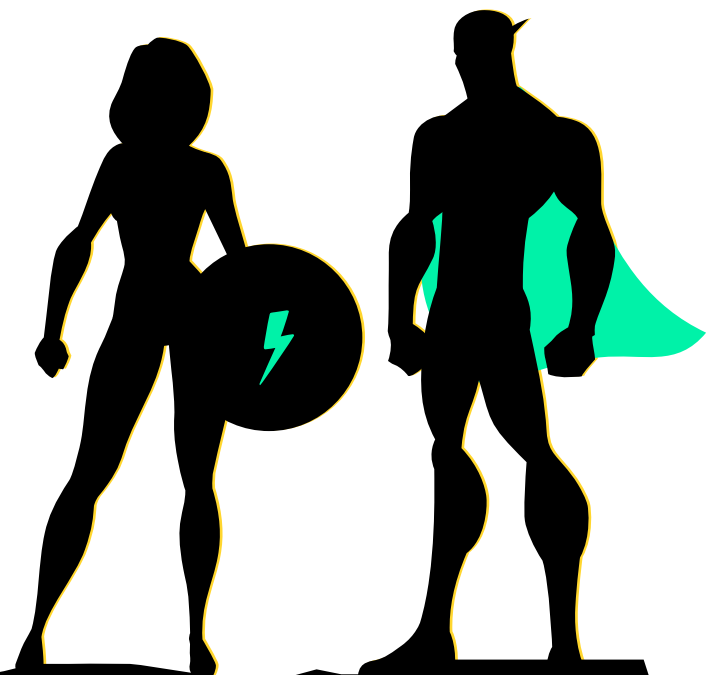
Optimizing Operational Efficiency for Sales, Marketing & Service Users

Because there are so many tips and tricks, what we've done here is focused them on how to create better operational efficiencies for end users in Sales, Marketing, and Service. Why? Two reasons. One, a better Salesforce experience for these teams encourages overall adoption. Two, these teams inspire business growth, and creating operational efficiencies for them can make a dramatic impact on your company's future.

Before reading on, we highly recommend making the move to Salesforce Lightning if you haven't yet. There will be no more product developments in Salesforce Classic, and Lightning is far superior in terms of experience and interface. Check out our migration tips to make the move!

We should also note that each tip and best practice that we've laid out is available in Essentials, Group, Professional, Enterprise, Performance, Unlimited, and Developer Editions. **Let's get to it!**

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› Create a Home Page Built for Productivity
› Put Note-Taking in Salesforce with Enhanced Notes

Section 2
Sales
› Use Lightning Paths to Move Stages
› Add Related List Quick Links to Reduce Clutter
› Update Opportunities Using the Kanban View

Section 3
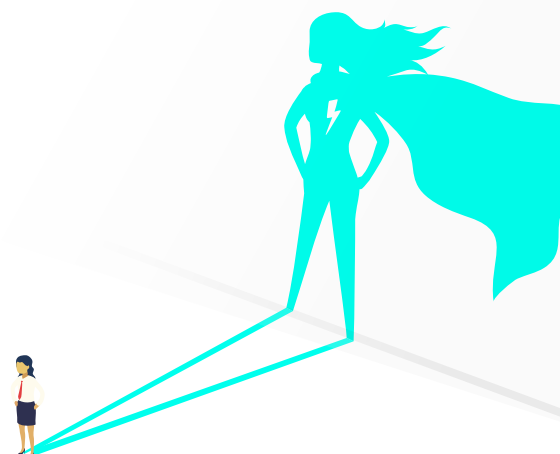## Marketing
› Prove ROI by Deploying Lightning Dashboards
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1 The Easy Wins – Optimizing Efficiency Across Your Org

Before we get into creating operational efficiencies for specific departments, let's first explore how your organization can make the best of the Lightning Experience across the board.

Create a Home Page Built for Productivity
One of the biggest improvements that came with Salesforce Lightning was the option to create an even better home page for users. The moment an end user logs on to Salesforce, they can be met with components filled with the most important items, such as their quarterly performance or tasks and activities today.

The default home page is great as it is, but don't feel like you have to stick with just that. It's easily customizable. You can replace and reorder components as well as replace the quarterly performance report with something different, say, the number of cases open for a service rep. We advise creating different home pages for different profiles.

Here are some recommendations by end profile:

Sales Profile
Consider adding (or keeping) a Lightning report component at the very top with their quarterly performance, or at least some type of performance. Sales reps are driven by how their performance is tracking for the fiscal quarter or year, so help them be aware of it.

Service Profile
Service reps log in to Salesforce with their first concern always being, "What is my workload for the day?" Consider having a list view of all of their assigned open cases at the top so they can get straight to work.

Marketing Profile
Marketing users are typically concerned with lead generation volume, as well as marketing-contributed pipeline or revenue. Consider having a dashboard component on their home page that consists of reports tracking KPIs like lead sources, pipeline generated, campaign ROI, and the number of leads generated.

Here are some helpful resources on how to further customize your home page experiences:

› [Trailhead] Build a Custom Home Page for Lightning Experience

› Set Up the Lightning Experience Home Page

› Set a New Default Home Page

› Lightning Experience Home Permissions and Settings
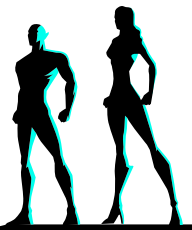
Put Note-Taking in Salesforce with Enhanced Notes

You may have walked through a sales aisle and thought, "Wow, there are a lot of post-it notes!" Simply put, that's what Sales does when they're on calls. They need to take notes of a buyer's pain points or hot words.

But what if they could be writing this down and storing inside of Salesforce, thereby also increasing adoption and efficiency? No more looking for post-it notes, and every note can be assigned to the lead, contact, or account that the rep is working. Productivity at its finest!

But how are Enhanced Notes different than the Classic Notes? It's simple. Enhanced Notes allows users to add rich text (e.g., bullets and numbers), pictures, and even related records or notes. Simple yet far more powerful.

Not only that. With the Lightning Experience, you can add a note-taking action button to places like your utility bar, global actions, and Salesforce1 mobile so that users will adopt this.

*NOTE: If you are looking to take your organization's note-taking and productivity to the next level, we highly advise checking out Salesforce Quip.

Here are some helpful resources on how to set up Enhanced Notes:

› Guidelines for Working with Notes
› Let Users Create Notes from the Chatter Publisher, Global Actions Menu, and Salesforce1 Action Bar
› Considerations for Setting Up Notes

2 | Optimizing Sales Efficiency

Salesforce adoption from sales teams is often regarded as the holy grail of admins and developers. It sounds silly, right? Well, when you're working with old dogs that may not want to learn new tricks, getting sales teams to adopt Salesforce can be tricky.

How do you solve this? Sales always needs more hours back in their day. Time and productivity are their greatest currencies. By creating a Salesforce environment in the Lightning Experience built for productivity, you are sure to see massive lifts in adoption. Let's get started with three tips and tricks.

Use Sales Path to Move Stages in a Deal or Lead Follow-Up
Sales reps work every deal and lead in phases. A lead is followed up with, qualified, then converted. A deal is in discovery, then worked, then quoted, and closed.

Compartmentalizing these phases into something visual and helpful can dramatically help sales reps immediately understand where they are within a deal cycle. That's where Sales Path comes in. Sales Path allows users to focus on lead follow-up and opportunities one stage at a time so they can move leads and opportunities faster through the pipeline.
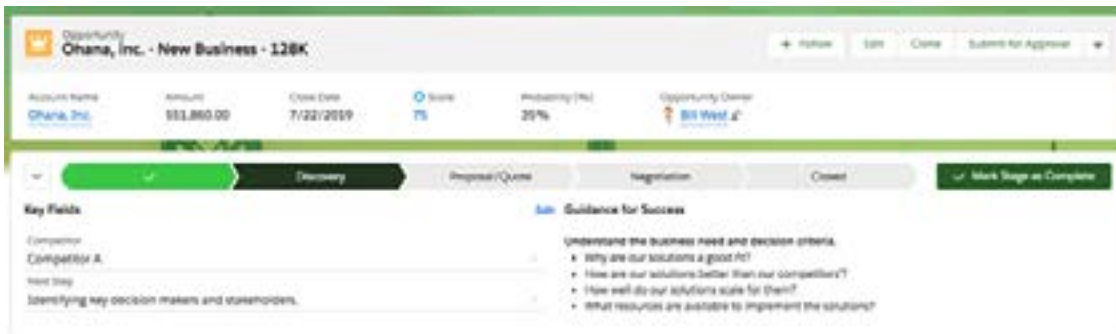
caption: Salesforce Sales Path Example

You can even extend this to other profiles such as Service where a path can be used to display the stages of a case being worked then closed.

Lastly, work with sales managers to create guidance for success. To put it into simple terms, at each stage within a deal cycle, you can include details about company policies (that may be compliance tips), tips for better selling, and links to relevant feeds.

Here are some helpful resources to get started:
› Sales Path: Help Reps Follow Your Company's Sales Processes in Lightning Experience
› [Trailhead] Customize a Sales Path for Your Team
› [Trailhead] Optimize Sales Processes Using Path

Add Related List Quick Links to Reduce Clutter

Related lists and objects can be very powerful for sales teams. If you have a robust Salesforce system, each account may have multiple related objects like cases, products, opportunities, quotes, etc.

With Salesforce Lightning, related lists no longer have to live at the bottom of a record (after endless scrolling). Salesforce Lightning layouts make it easy to add related lists on the right-hand side.
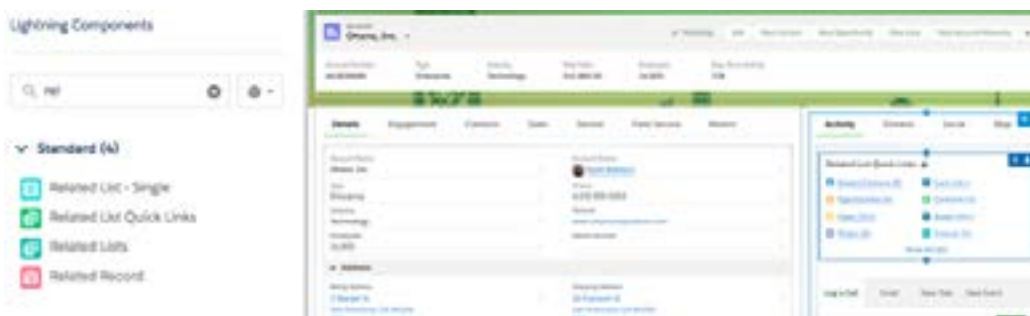

caption: Adding Related List Quick Links

However, that may sometimes even get cluttered with multiple tabs. If there is one thing that salespeople hate, it's clutter and not being able to find something. We recommend adding related list quick links to better the experience. Now there is no more clutter, and you give sales teams immediate access to additional objects.

Update Opportunities Using the Kanban View

Kanban, pronounced "kon-bon," is a Japanese term meaning "signboard" or "billboard." The Kanban originated from the Toyota manufacturing line to improve productivity without sacrificing quality. If you're a developer, you've probably seen this before in sprints.

Salesforce Lightning can now bring this same form of lean productivity to sales teams. By deploying a Kanban view to sales teams, you can allow users to drag and drop records from one column to another to actively change status as well as summarize totals.
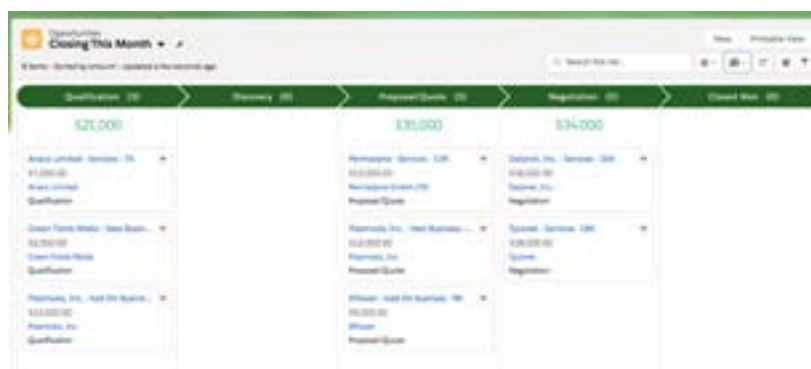
caption: Salesforce Kanban View

Lightning Tips & Tricks

Book a Demo »

Honestly, this is an easy one and is hopefully a solid reminder or indicator that you're on the right track with making the most of the Salesforce Lightning Experience. Nonetheless, it's important to call out because of how powerful this is for sales reps.

› Display a Visual Summary With Kanban

› [Trailhead] Visualize Success With Path and Kanban

3 | Optimizing Marketing Efficiency

There are cases where Salesforce may not be the day-to-day destination for most marketing teams. With powerful marketing automation solutions available such as Hubspot and Marketo, marketers may tend to spend their work hours in other environments.

Nonetheless, marketing cares about ROI, insights, and data. By creating a Salesforce environment that encourages fast ways to pull ROI metrics, learn from insights, and maintain data integrity, you will have a satisfied marketing team that may spend more time in Salesforce.

Prove ROI by Deploying Lightning Dashboards

Hopefully, this is an easy one and your Lightning dashboards are already deployed. Two of the greatest gifts to come out of the new Lightning Experience were the ability to create more than three columns in a dashboard and the drag-and-drop features. Absolutely brilliant.

Marketers are constantly being pressured to prove ROI, and Lightning dashboards can help give them a single place to go to pull those metrics. By creating a command center for marketing managers and executives to visually see KPIs like ROI by campaign or lead volume by source, you are putting them on the path to success.

Here are three amazing marketing dashboards – built in Lightning – that you can send to marketing teams that will make them want to spend every waking minute in Salesforce.

Sales & Marketing Dashboard

Sales and marketing teams are often butting heads. Create a dashboard where they can both go to hold each other accountable. Consider reports with KPIs such as pipeline, lead generation for the month, and dollar amount of pipeline by lead source.

Marketing Executive Dashboard

Marketing executives are always being put to the test to prove ROI. Create a dashboard with report components showing top campaigns by opportunity amount, revenue by channel (email, web, or social media), and marketing-contributed pipeline and revenue.

Campaign Influence Dashboard

Not every campaign contributes to revenue or pipeline equally. Oftentimes, they may "influence" pipeline or revenue at certain stages. There are a lot of great articles online about how to build campaign influence models, and we recommend taking a look and putting these metrics into a dashboard.

Encourage Campaign Adoption

Okay, okay. We get it. It's not your job to tell Marketing to use Campaigns. But using Campaigns can be extremely powerful when it comes to measuring ROI and marketing's influence on pipeline and revenue.

What we've seen is that the Campaigns object is often underutilized, which is why we encourage you to take the opportunity to revisit how Campaigns are being used and structured within your ecosystem when you make the move to Lightning.

How can you help? Lightning layouts can help surface more useful information for marketers such as better organized related objects, donut charts of campaign members, and even Einstein scoring (if you're using Pardot).

Customize Duplicate Matching Rules in Lightning

There is nothing more disruptive in proving ROI, discovering insights, or successfully passing leads to Sales than duplicate leads and records. In Salesforce Classic, these were, more often than not, difficult to diagnose and cure.

With Salesforce Lightning, however, duplicates can be easily surfaced. Now reps are the first line of defense for combatting duplicate data. First, make sure the Potential Duplicates component is added to each lead, contact, and account record.
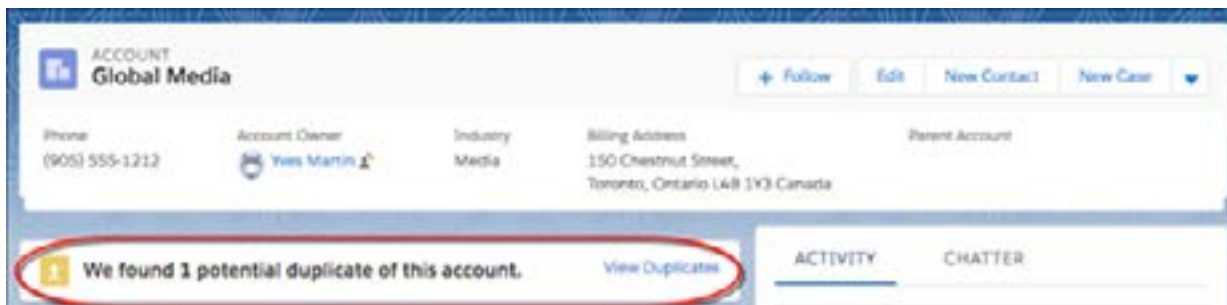
caption: Lightning Duplicate Matching Rules

Standard matching rules that come out of the box don't always work that well. We've found that leads that have a matching email address but a different name are not identified as potential matches. You can customize these though.

We recommend using Email Address as the single identifying factor when matching potential duplicates. Create a custom matching rule based on Email Address.

Here are some articles on where and how to get started with managing duplicates:

› Manage Duplicate Records
› Show Duplicate Records in Lightning Experience

4 | Optimizing Service Efficiency

At last, we come to Service! Like Sales, service teams care about speed and productivity. Today's customers care more about experiences with a brand than actual products and services. In fact, according to Salesforce, 84% of customers say the experience a company provides is as important as its products and services.

Service teams are at the forefront of providing these experiences. Speed is of the essence, and you should consider creating a Lightning experience built for speed without sacrificing quality.

Set Up Omni-Channel to Route the Right Cases to the Right Service Rep

Customers demand immediacy when it comes to interacting with a company. This is all the more apparent when it comes to contacting them for help. Companies that thrive today are ones that make it easy for customers to find and contact them for support on multiple channels such as phone, email, web forms, web chat, text messaging, and even social media.

The issue with this though is that it puts a lot of strain on your internal service resources. Having customers come in from so many channels can be hard to manage. That's where Omni-Channel from Salesforce Lightning comes in.

Omni-Channel takes incoming cases from various channels and routes them to the most qualified, available support agents based on routing criteria that you define. By sending cases to the right service reps at the right time, you are putting less strain on the service team and providing an even better experience for the customer.

Salesforce's Trailhead recommends these types of Omni-Channel management and routing:

Queue-Based Routing

Assign all incoming cases in a single queue regardless of availability or specialty. This may often be used for small businesses with shorter case volumes.

kills-Based Routing

Assign skills to agents and required skills to work item types. This may be in cases where your company has a large and complex portfolio where specific service reps have the right knowledge to assist.

External Routing

There are some cases where partners can assist in service issues or implementations. Therefore, you will want to use APIs to integrate partner routing.

Here are resources on how to get started:

› [Trailhead] Start Routing with Omni-Channel

› Add the Omni-Channel Utility to a Lightning Console App

› Enable Skills-Based Routing

› Create Skills for Skills-Based Routing

Eliminate Clicks with Macros

Have you ever worked in service or a support center before? Well, if you haven't, it's important to know that a majority of incoming cases are typically very similar, if not the same.

How do you set up this service? Where do I go if I need this? What are your hours of business?

It can be repetitive and tiring for service agents especially if they need to type the same responses over and over again. Alas! Macros can solve this in the Salesforce Lightning Experience.

Macros can help solve these repetitive incoming cases and tasks, thereby increasing productivity and overall morale. A macro is a set of instructions that tells your Salesforce system how to complete a task. So when a user runs a macro, the system will perform the task that you created.

An example may be using a macro to send a canned response to a repetitive support question such as, "What are your hours of business?" Take note that macros were available in Classic but have gotten far better upgrades in Lightning.

Salesforce Classic

Macros can be used in objects with quick actions and feed-based layouts. In other words, support can only be used – but not always limited to – contacts, accounts, leads, and cases.

Lightning Experience

But with the new macros are supported by standard as well as custom objects. There are far more customizations and availability for macros like adding them in Quick Actions or to your utility bar in the Lightning App.

We recommend exploring Macros in the new Lightning Experience and working with the service team to make these available. Macros can save a lot of time and energy for service teams, and the Lightning Experience makes these even more customizable and available to them.

Here are resources on how to get started:

› [Create Macros in Lightning Experience](#)

Guide Agents by Setting Up Lightning Flow for Service

Nothing can encourage productivity more than using the power of Salesforce for process elimination and automation. Lightning Flow for Service is the centerpiece for this.

With Lightning Flow for Service, you can create a to-do list on a record page for users. So when an agent opens the page, they can see a list of next steps. Clicking on a step can launch an action, such as a flow, that can automate processes and guide agents through their work (like completing a case).
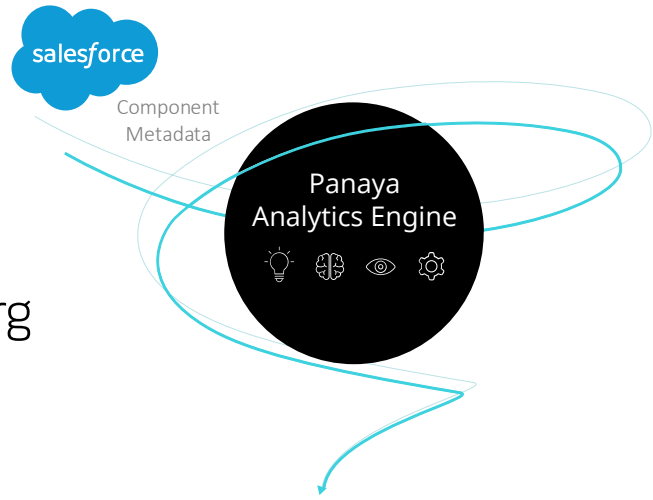
What are the benefits of Service Flow?

For one, it dramatically improves productivity and reduces guesswork. It also helps with ramping service reps because your system is doing most of the work.

Check out some resources on how to begin making Service Flows:

› [Trailhead]Lightning Flow for Service

Maintaining Efficiency
in Your Sparkly New Salesforce Org

Component
Metadata

Panaya
Analytics Engine

A Hero's Work is Never Done

Now that you've implemented these tips and tricks into your Salesforce org you can sit back and relax.
Just kidding...your work here is never done, is it? The transition to Lightning required that you reevaluate a lot of your business processes.

The change also brought some major overhauls, and now that you are fine tuning your processes the last thing you want is to see them fall back into inefficiency. Overtime, complexity can seep back into your org, and all your hard work will be outdated once more. Don't let that happen.

The Solution You Need

Panaya ForeSight brings you a solution that reduces complexity and maximizes your org's efficiency on a regular basis, so that things don't slowly fall back into disarray. ForeSight gives you full visibility into every change and customization you make, allowing you to map your org's components and dependencies, and create Salesforce architecture that is straightforward and clean.

With ForeSight you will instantly see the impact of a new project or request BEFORE you even begin. Clearly define the scope of the project, the impacted components that will require additional development, and clear testing plans to be sure you are prepared for a seamless deployment, every time.

Reveal
**Mapped
Component
Dependencies**

Identify
**Impacts
of Change**

Pinpoint
**Development
Needs**

Determine
**Risk-based
Testing Plans**

Prepare
**Seamless
Deployments**

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