

# 6 REASONS

## TO MAKE THE SWITCH TO LIGHTNING

41%

### INCREASE IN PRODUCTIVITY WITH FASTER TOOLS

If you want a better  
Salesforce user experience  
with faster tools, you  
want to transfer to  
Lightning.



**better**

**better**

**"THE BIGGEST  
DIFFERENCE? SIMPLE.  
THE NEW LIGHTNING  
EXPERIENCE IS ALL  
ABOUT  
EFFICIENCIES."**

BRIAN KWONG  
VP OF OPERATIONS  
BETTERPARTNERS.COM

If you're an active part of the Salesforce community, you know by now the importance of making the switch from Classic to Lightning. Here's the thing - this transition isn't just hype. The longer you postpone, the farther you are from staying on top off all of the latest and greatest Salesforce has to offer. This collection of tools and technologies are an opportunity for you to provide accurate information at a faster pace, increase marketing and sales, and - in short - become better at your job.

Take it from two tech geeks who know salesforce.com inside and out.

We've been consulting Salesforce administrators and owners of successful businesses on how to use (and get the most out of!) this CRM platform for the past decade. Still not sure you're missing out? Here are [Better Partners](#) top "6 Reasons to Make the Switch to Lightning."



# 6 REASONS TO MAKE THE SWITCH

## FAVORITES

No more bookmarking Salesforce pages in your browser! Now you can save Favorites within Salesforce, so you can quickly return to Accounts, Contacts, Opportunities, Reports, and Dashboards whenever you need! Favorites are accessible in mobile, too - how convenient is that?!

## SEARCH

"Type Ahead" intuitively recognizes what you're doing and suggests options all from the screen you are on. No more constantly clicking and opening more screens just to find an existing record. You can search for more tools, like Dashboards, Notes, and Files, making this a valuable, time-saving resource.

## FLEXIBILITY

Lightning knocks down barriers to building a clear picture of your data. You can customize what pages look like based on what's important to you, your team, and your company.

## CALENDAR

A long-time ask finally comes to life! The new Lightning Calendar allows you to visualize your data like never before, giving you the ability to display any object with a date in a Calendar view!

## PARENT RECORD CREATION

Need to create an account for a contact you are entering? Now you can do it on the fly, without leaving the new contact page. Create a new record from just about any Lookup, without the downside of enabling "Quick Create" (begone!).



## **PATH**

Path offers a simple, visual way to guide people through every step of almost any process, focusing them on the info and intel to ensure their success. Make it easy to train new team members in the ways that make your company "Better" than your competition!



**READY TO SWITCH?  
WE CAN HELP.**

## **FREE 30- MINUTE DISCOVERY CALL**

To receive a FREE 30-Minute Discovery Call with Better Partners, take a few moments to run the lightning experience readiness check (salesforce instructions are included below). Or, connect with us directly to talk about your next steps at:

- **414-375-8484**
- **bebetter@betterpartners.com**

We're here to help you make the switch from classic to lightning - it's a better, faster timesaver that will make your life much easier.

**"PATH IS AN  
INTUITIVE TOOL...  
ESPECIALLY FROM A  
SALES TEAM STANDPOINT.  
KEEP YOUR SALES TEAM  
FOCUSED ON THE RIGHT THINGS  
EVERY STEP OF THE WAY TO  
CLOSED WON! NEED TO TEACH A  
NEW TEAM MEMBER YOUR SALES  
PROCESS? USE PATH AS  
YOUR GUIDE!"**

TORREY NAGLE  
PRESIDENT AND FOUNDER  
[BETTERPARTNERS.COM](http://BETTERPARTNERS.COM)

**better**

# HOW TO RUN SALESFORCE LIGHTNING EXPERIENCE READINESS CHECK

(Instructions from Salesforce.com)

The Lightning Experience Readiness Report helps admins learn more about what to consider before they turn on Lightning Experience. In addition, based upon what functionality your org currently uses, the Readiness Report contains recommendations on what to do next. While the Lightning Experience Readiness Report doesn't identify all of the unsupported features and customizations in Lightning Experience, it helps give you a sense of how ready your org is to transition.

## **To run the Lightning Experience Readiness Report on your own production or sandbox environment:**

- From Setup, in the Lightning Experience Migration Assistant, click Check Readiness tab, and then click Check Readiness.
- Click Allow, Sales Cloud, and then Check Readiness, and then close the window. Feel free to watch the Tips for Migrating to Lightning Experience video while you wait for your report to complete.
- When you receive the readiness report email, open it and review how difference features are highlighted.
- Note
- Note

It can take a few minutes for the report to appear in your inbox. If you don't see it, try searching your email for "readiness."

**If you'd like [Better Partners](#) to help you run your readiness check or talk about next steps, reach out to us at 414-375-8484 or [bebetter@betterpartners.com](mailto:bebetter@betterpartners.com).**

The road to best begins with Better