BITWISE INDUSTRIES

How to Get Your Users to Love Salesforce

A Three-part Guide to Help Simplify and Optimize Your Lightning Experience

Contents

How Deep Is Your Love for Salesforce?

Though sometimes you hate to admit it, your users have a love/hate relationship with Salesforce. Your vocal users have told you why they feel Salesforce is challenging. Your articulate users have also told you why they feel Salesforce is not worth the effort. But you've addressed their issues and won them over—so let's do more of that!

In this three-part handy dandy guide, we'll walk through a few simple tricks to help you increase the adoption and satisfaction of your users. Depending on the size and structure of your organization, implementing these ideas may seem complicated, but we'll address that as well.

Overall, we want to help more people love Salesforce and get the most out of Lightning Experience and the other tools they are investing in.

You probably wouldn't say you love a CRM or Salesforce, and we understand. However, achieving that feeling has significant rewards to both users and the business. It's worth the effort to find that lovin' feelin'.

Did you know?
Deeper love = deeper adoption. Forty-two percent of organizations who tried to make Salesforce their system of record couldn't—because their users were consistently keeping information in other tech tools instead.

(Source: https://cloudingo.com/download-benchmarks/)

Part 1: Simplify Your Lightning Apps

If your users can't find it, they can't use it.

BEGIN WITH THE END IN MIND

We wish we could take credit for that, but you know we can't. Stephen Covey's second habit in his *7 Habits of Highly Effective People* is a hidden gem for Salesforce adoption. The principle speaks to having purpose and direction—knowing where you're going before you step out the door. More specifically, your team should consistently know where you are all headed together and why.

There are three parts to achieving this, so let's take them in reverse.

1. The "why" is achieved by understanding needs. Look at the needs of the business, the team, and individuals. This clarity will allow better triaging, more thoughtful building, and will help achieve the desired outcome.
2. The "where" is achieved by leading the team to clarify how, when, and where changes should be made to achieve what the "why" requires.
3. Helping the team "consistently know" will require some prominent visuals and signposts that align with your unique business culture and personality.

When you meet with your end users, truly seek to understand their needs. Use active listening and communicate their needs back to them to ensure complete understanding. Given terminology differences and communication challenges, the best way to achieve clarity is using visual tools like mockups, diagrams, and process flows. Miro is one great option, though many exist. Gaps in understanding mean gaps in the build—and these gaps can easily occur as the staff and project team change over time

(As an aside, also check out Stephen Covey's third habit, "Put First Things First" to help manage the flood of requests.)

Disclaimer: *It's not uncommon to have stringent approval and change management processes, especially in large or complex organizations. Before you begin, talk to your manager about these processes to understand what's coming. Follow that process exactly.*

LET'S GET HYPOTHETICAL

Brian is on the sales team. He follows up on leads that come in through the company's website and manages a pipeline of deals. Brian finds it challenging to use Salesforce, and everyone in the company knows it.

"It slows me down. I get paid to sell."

"I don't need to put anything in Salesforce. I keep it all in my head. Go ahead. Test me."

You meet with Brian to understand his concerns and complaints. He explains his workflows.

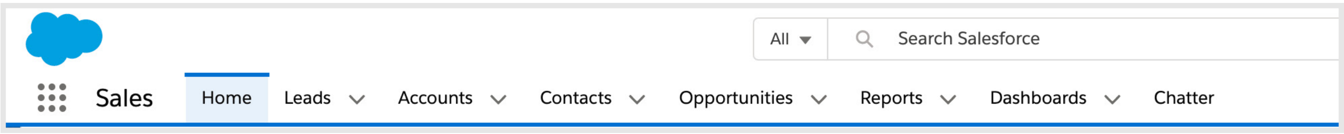
"Don't even get me started on opportunities. I keep all my deals in a spreadsheet. It's straightforward, understandable, and easy. Then I just send it to my manager every Friday."

"Anytime I try to create a lead in Salesforce, it's too slow. I have to click on 'leads', then 'new lead'. Then I have to enter way too much information."

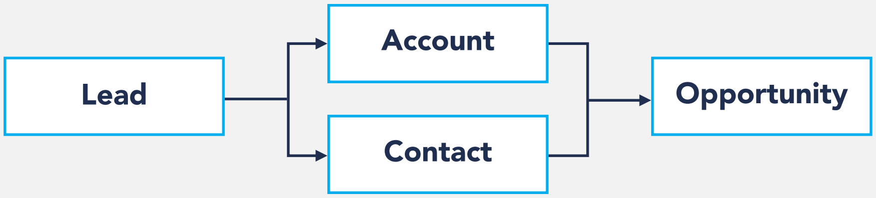
You start to realize this is probably more perception than an actual issue with Salesforce, but Brian's busy and you don't want to get in his way. Here's how you can help Brian:

ORGANIZE TABS BASED ON WORKFLOW, LEFT TO RIGHT

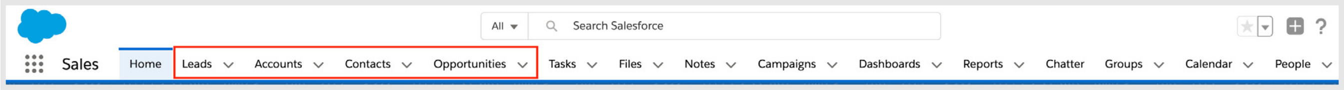
Now that you understand Brian's workflows, this will be easy.
Out of the box, Salesforce provides the following:



In meeting with Brian, you find he doesn't even need half of this information.
His primary workflow only entails leads, accounts, contacts, and opportunities.

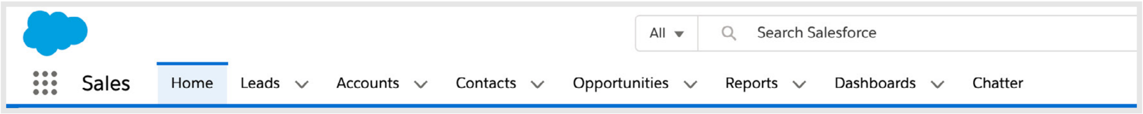


After a few simple clicks, you transform the Sales Lightning app, making it more usable:



HIDE UNNECESSARY TABS

Following the tabs Brian will need, you notice Salesforce has wonderfully provided many more.
Let's simplify.

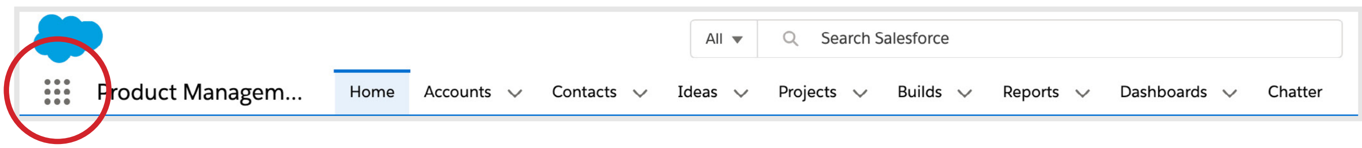


Much better. If we can get Brian to use Salesforce rather than his spreadsheet to track his deals, we can build exactly the report he needs to present to his manager every Friday. Then we'll schedule it so Brian doesn't even have to do that task (but that's a different conversation for a different day). More time for selling!

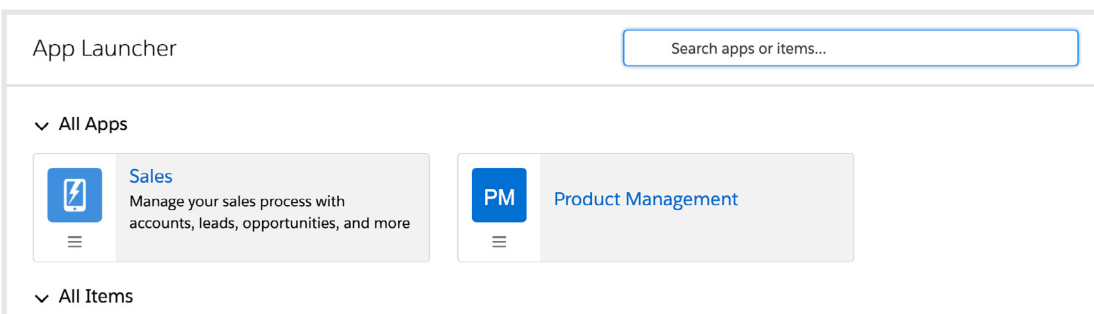
MULTIPLE, COMPLEX WORKFLOWS = MULTIPLE APPS

Brian came back with a new requirement. Because of his interactions with customers, he is part of a committee that handles product management. The committee meets every other Friday to talk through customer requests and prioritize them for the development teams. He'd like you to create that workflow as well.

Rather than cramming these additional tabs into his existing Sales app, we can easily build out a second app for product management and assign it to Brian through a permission set (since the whole Sales team won't need it). Here's what we end up with:



Now Brian can easily toggle back and forth between his apps and stay focused on his work.



IT'S THAT EASY?

Yes. These are just a few simple changes that can be made to your Lightning apps to streamline your org for end users. With so many configuration options, it's easy to over-engineer Salesforce. Keep it simple!

Did you know?

By using the app launcher—that waffle-esque symbol at the top right hand corner of your Salesforce home page—Brian is able to view all of the apps that have become available to him, further streamlining his workflow.

Part 2: Optimizing Pages Within Lightning Apps

In part one, we discussed how to leverage Lightning apps to help your users by minimizing the noise in Salesforce. We talked about Brian, that vocal sales guy, who struggled to adopt Salesforce. But he started using it more thanks to a few simple changes to his Lightning apps.
Part two focuses our attention on the individual pages within the Lightning app. Salesforce has released several notable components for these pages:

- **Lightning Page Templates** - Control the general layout of the Lightning page with sections to house your Lightning components.
- **Lightning Components** - Organize data elements effortlessly into a Lightning page template.
- **Dynamic Lightning Pages** - Show/hide individual components so each user sees exactly what they need to see when they need to see it. Each of these options are configurable to the nth degree, and with so many configuration options to discuss, let's focus on a few concepts. The configurations will fall into place.

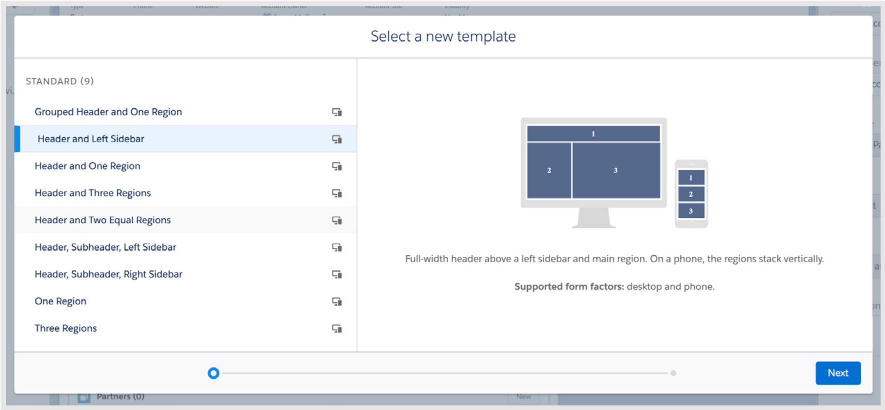
In part three, we dive into maximizing page layouts.

DEFINE STANDARDS FOR ALL OBJECTS

Change is difficult for most of your users. So minimize change by defining a standard template and component layout for all objects in your org. You'll make navigation a breeze for users with any level of experience.

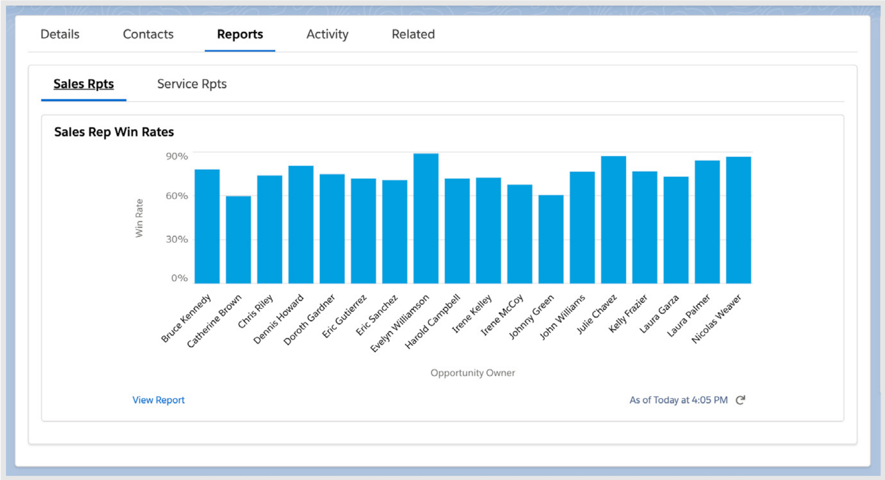
LIGHTNING PAGE TEMPLATES

Change is difficult for most of your users. So minimize change by defining a standard template and component layout for all objects in your org. You'll make navigation a breeze for users with any level of experience.

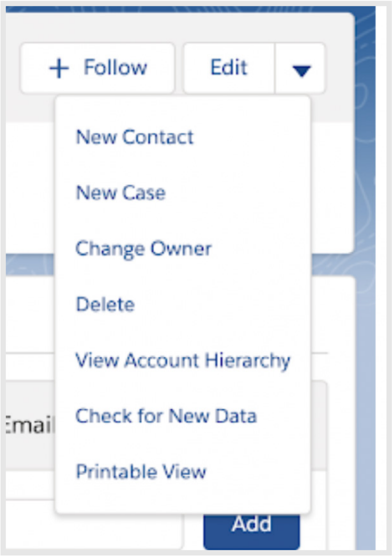


TABS

With tabs on Lightning pages, you can maximize the visible screen space, and organize information into consistent, coherent, thoughtful panes. Too many tabs? Try nesting tabs! Just as you did with the templates, choose a standard tab order to use across all objects in your org.



BUTTONS

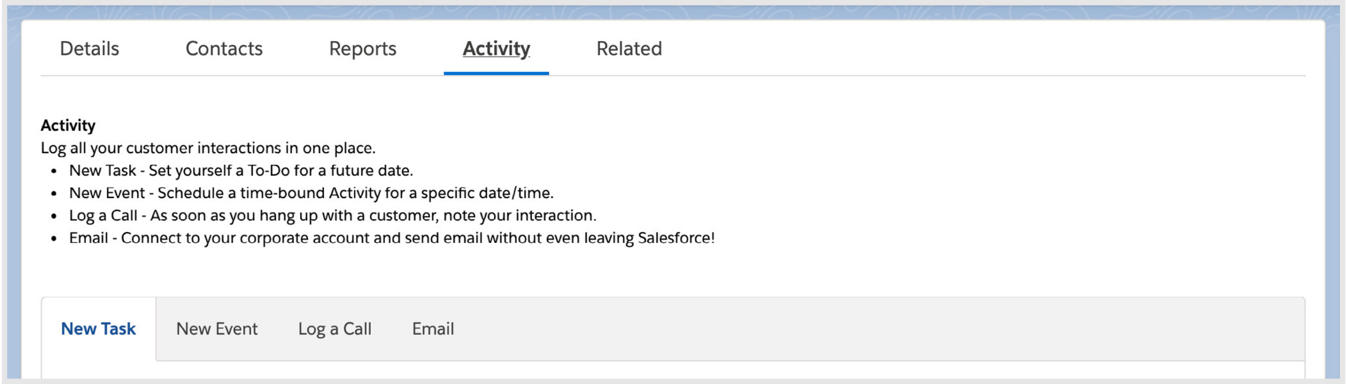


With so many standard and custom buttons on your record pages, it's easy for these to become cluttered too. Arrange your buttons so the most commonly used ones are readily available, and the rest can be accessed through the drop-down menu. (These buttons need to be cleaned up too, but we'll cover that in Part 3: Page Layouts.)

Build Training Information Right Into Salesforce

RICH TEXT COMPONENTS

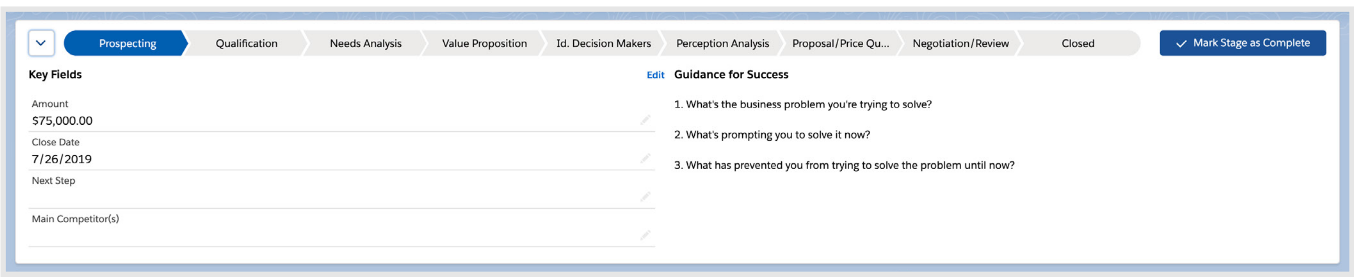
Using a simple Lightning component, you can teach your users exactly how to use Salesforce. Simply drag a rich text component onto your template and create your training documentation.



PATHS

Now available on any Salesforce object, a path will allow your users to successfully move through a defined business process, like stages of an opportunity or phases of a project. Most importantly, they can be configured with ‘key fields’ and ‘guidance for success’.

- **Key fields** - Which fields are most important for the user to access during the current stage or which fields are required to move to the next stage (insert validation rule for extra data quality).
- **Guidance for success** - How will your user collect this data? What questions should your user ask the customer to move to the next stage? Include it all here in a rich text field!



Filter Components Like a Champ!

One of the great features Salesforce has included with their Lightning pages is the ability to filter components. This feature has several incredible uses to explore:

- **Allow users to hide training tips** - If you build training tips into rich text components, give your users the ability to toggle them off and on.
- **Display screen flows based on a record status** - Do you have processes for one department to hand off work to the next? For example, how does your sales team notify your service team when a deal closes? Try placing a screen flow Lightning component with pertinent information that only displays when the opportunity is closed.
- **Make Lightning page management easier** - Once you’ve created standard layouts, merge multiple functional groups into a few Lightning pages by filtering components based on the user’s role or profile. Cool note for those migrating from Classic: Lightning record pages utilize the classic page layouts you know and (hopefully) love. Lightning record pages won’t give your users access to fields, related lists, or buttons they don’t already have. We’ll explore that more in Part 3: Page Layouts.

Part 3: Maximizing Your Page Layouts Experience

Part one and part two of this three-part guide brought to light some simple changes you can make to Lightning apps and Lightning record pages, respectively, to reduce the noise your Salesforce users' experience and increase their adoption of the technology.

The focus of these three parts is to walk through how administrators can make small adjustments to the user interface that will help make Salesforce a more usable tool for all end users. Your end users won't just appreciate it, they'll love it.

For the final part of our three-part guide, let's take a look at maximizing the value in your page layouts. These page layouts are consistent between classic and the Lightning Experience, so whether you've been on Lightning for a while or still getting used to it, this will feel familiar.

In Lightning, the details component of a Lightning record page pulls in the logged-in user's assigned page layout into Lightning. This means a single Lightning record page can be used to accommodate multiple out-of-the-box classic page layouts.

STANDARDS FOR CREATING PAGE LAYOUTS

As with Lightning record pages, it's important to define standards for how you create page layouts. This will help you more quickly, effectively, and efficiently manage your pages and empower your end users with thoughtful, consistent layouts.

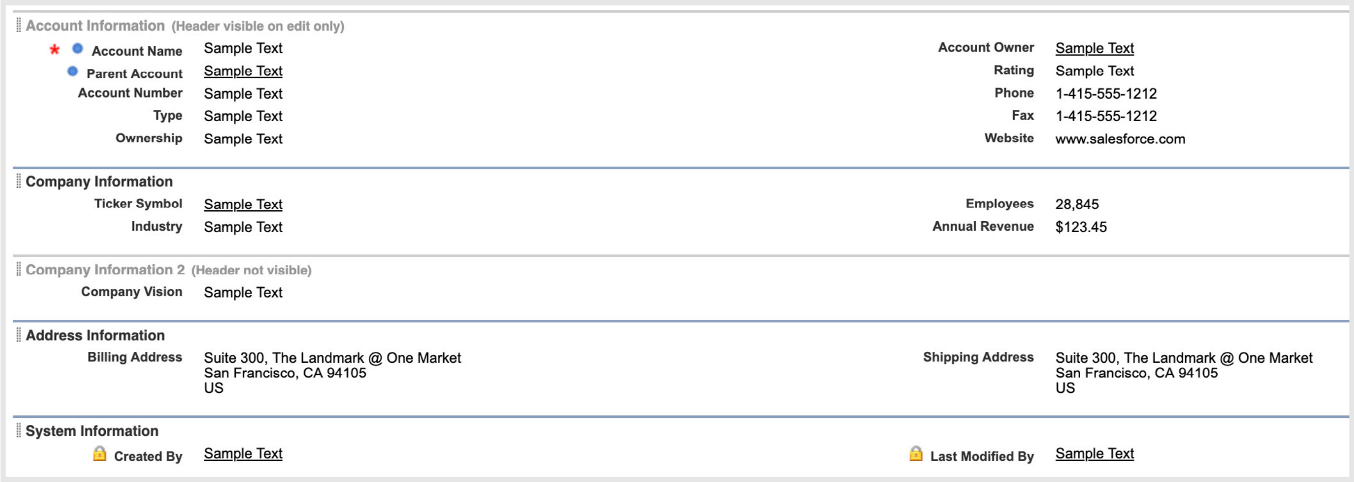
SECTIONS

Field Arrangement

One easy time-management concept is the idea of "grouping similar tasks together." Why not do the same with page layouts? Here are a few questions to ask:

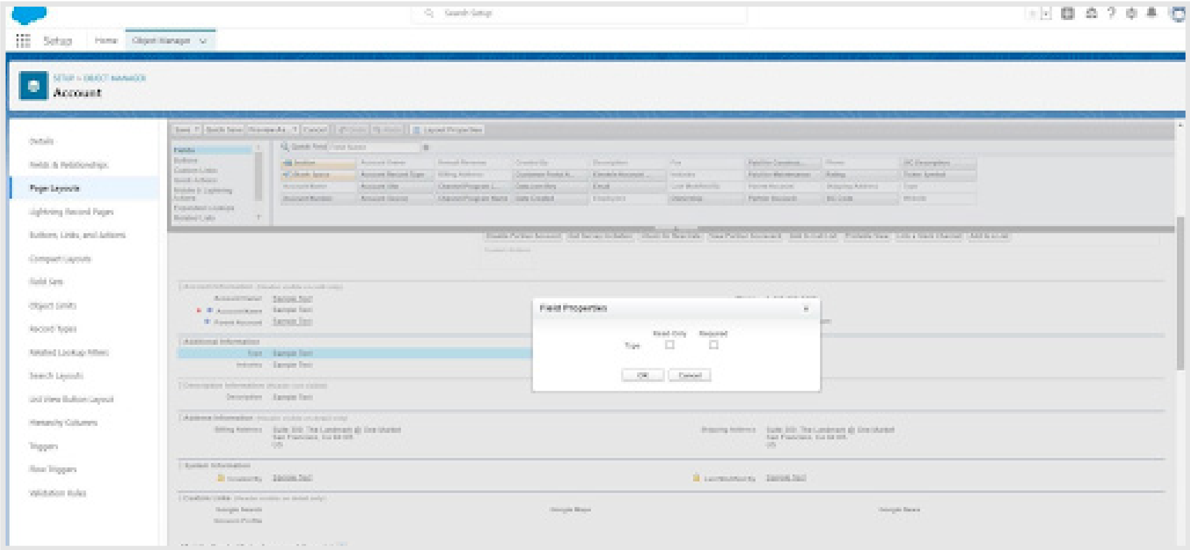
- Are fields organized with similar fields grouped into sections or are they all in a single section?
- Does the order of those fields make sense from a user-workflow perspective?

As you know, Salesforce will place any new fields at the bottom of the first section, labeled simply "Information." Move things around and make life easier on your end users.



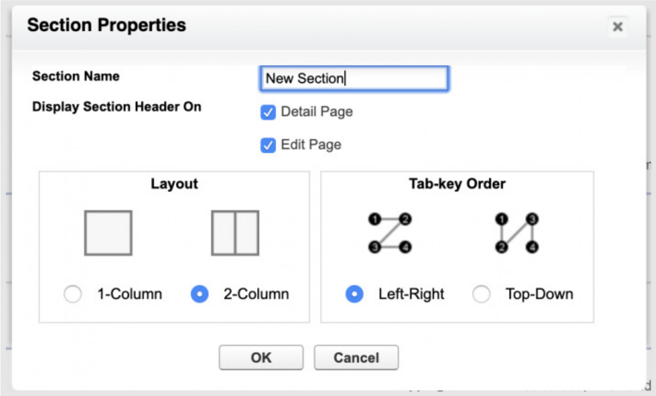
Field Properties

Once your Field Arrangements are in place and your tasks are grouped together for maximum efficiency, Field Properties can help create an org where your users are always adding necessary information, with nothing slipping through the cracks. By clicking the wrench on any field, Field Properties can be opened. In Field Properties, admins can make a field required or read-only, making sure that end users have access to the information they need to enter, and that other information isn't tampered with.



One-Column vs. Two-Column Layouts

When creating a section in a page layout, you choose between one-column and two-column layouts. In many situations, choosing which layout is relatively simple, but here are a few pointers:



- One-column layout - If you've got a text area field with large amounts of text, use a one-column layout. Your users will thank you.
- Two-column layout - This layout works great for most field types, but also consider your Lightning page build. Is the section going into a sidebar or main column? A two-column layout won't work very well in a sidebar.

When in doubt, try something. It's easy enough to change, so experiment.

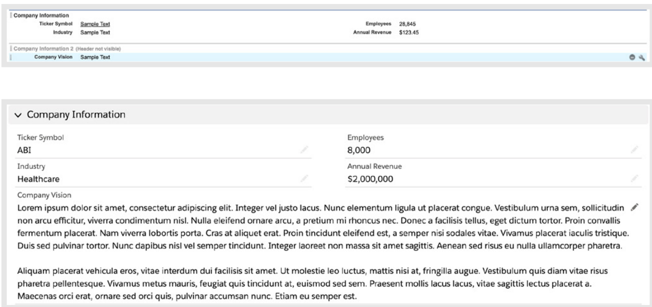
For better results, involve your end users. At the end of the day (and this is true for all things), if your build doesn't match your end user expectations and workflow, you've got more work to do.

Blank Spaces

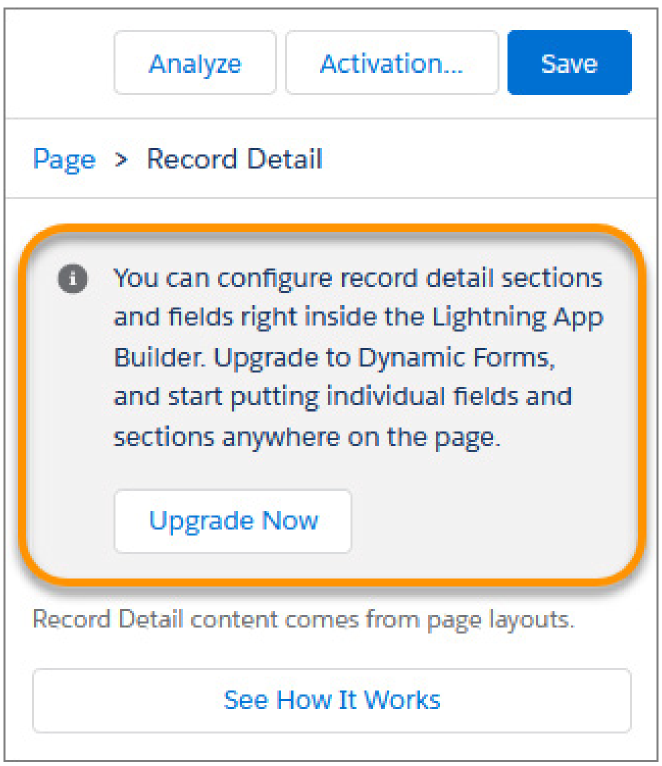
Blank spaces are little gems in page layouts that allow you to truly tailor the end user experience to provide a better flow of information. Strategically placed, they can do a ton for your end users.

Put It Together

Putting all three of these together, you can build a great experience for your users.



- One favorite trick is to combine two-column and one-column layouts with a single, visible header.
- In a scenario where you need to combine several fields, some of which are text area fields, create a section but hide the header from the detail and edit views.
- One consideration: tab key order. For your two-column sections, utilize the left-right tab order and your users will never know there are two sections.



Dynamic Forms

As Lightning record pages evolve, so does the user experience. Included in the Winter 2021 release, Dynamic Forms were added to include the ability to configure record detail fields and sections inside the Lightning App Builder.

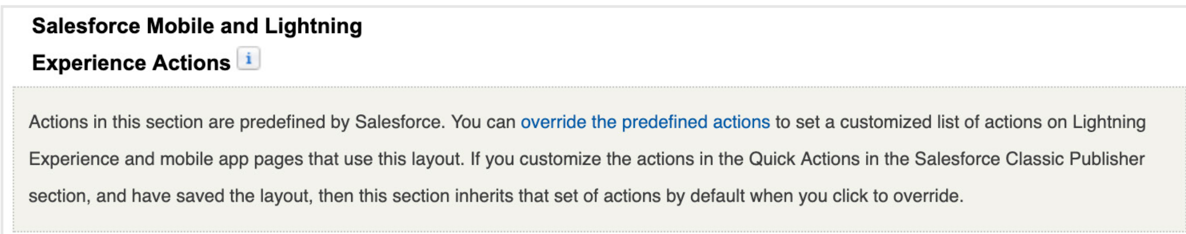
This feature is widely available amongst editions and helps migrate the fields and sections from your page layout as individual components into the Lightning App Builder. When this happens, they can be configured just like the rest of the components on the page while giving users access to only the fields and sections necessary.

How does it work? A new Fields tab in the component palette contains Field and Field Section components, which are the building blocks for Dynamic Forms. To get started, open an existing record page in the Lightning App Builder, click Upgrade Now from the Record Detail properties pane to launch the Dynamic Forms migration wizard, adding fields and field sections to the page for your users.

BUTTONS AND ACTIONS

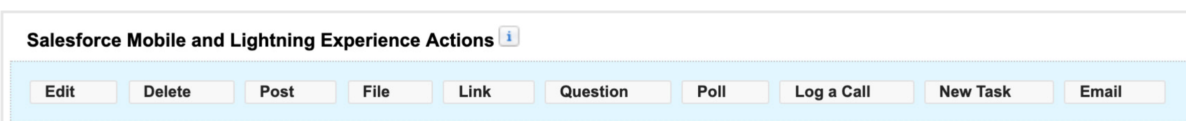
Here are a few quick tips for button and action management in Salesforce Lightning:

- Buttons and actions are controlled through mobile and Lightning actions on your page layout. The first step is to click 'override the predefined actions'. This will give you access to customize the button layout.



- Group similar buttons together. There are three types of buttons and actions available in this part of the page layout:
    - *Record actions (edit, clone, delete, etc.)*
    - *Chatter actions (post, file, question, etc.)*
    - *Activity actions (new task, log call, email, etc.)*

It will make managing these buttons a lot easier if you group them together.

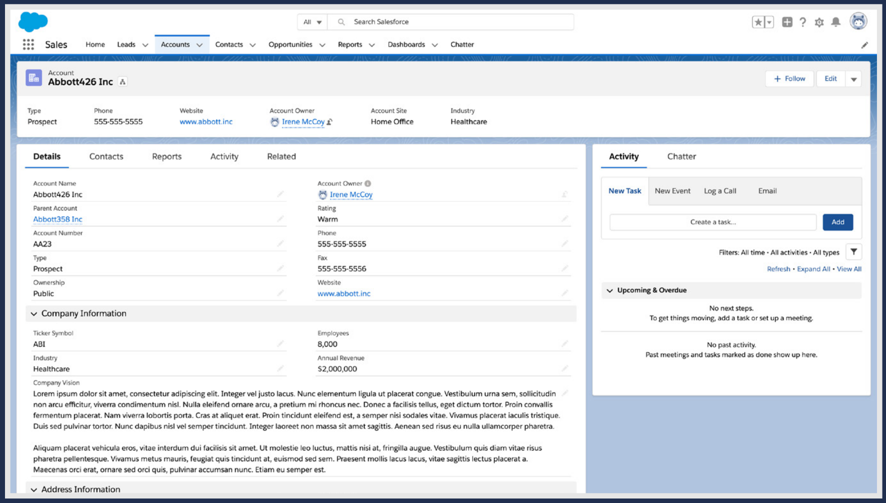


- Remove unnecessary buttons. If your users are not able to clone or delete a record, remove it from the page layout. Default buttons also include New Lead, New Opportunity, etc. These aren't always appropriate for every object. Make a thoughtful decision about what to keep and what to remove.

Where to Start

Your entire org will likely require changes, but at a minimum each Lightning app should be evaluated. There's no right answer about where to start, but just pick a spot and dive in.

1. Meet with your end users to understand their workflows and listen to what they say.
2. Start at the Lightning app and evaluate the tabs. Build separate apps for each workflow.
3. Create standard-based record pages with built-in training documentation.
4. Organize your page layouts into end-user-focused sections. Manage buttons and actions to ensure appropriate workflow and data quality.



Salesforce is a powerful platform in which your company has invested heavily to capture the data it needs to make well-informed decisions. But none of that works if people don't use it. It's your job to ensure the system is usable, and it is absolutely an art form. Build something you can be proud of and your end users will love!

About Bitwise Industries

Bitwise Industries builds tech economies in underestimated cities, driving digital transformation through Salesforce, DocuSign, and digital product development.

Our technology professionals have deep experience applying cutting-edge technology solutions to help government and private-sector enterprise clients navigate the technology landscape to optimize their organizations.

Leverage our Salesforce management services to ensure your Salesforce org serves your evolving business requirements and not the other way around. From object configuration to custom coding, we've got you covered. Have questions about Salesforce optimization? We'd love to hear from you!

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