

# SALESFORCE – THE LIGHTNING TRANSFORMATION AND BEYOND

## PART 1

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Assessing Salesforce's journey is akin to Heisenberg's uncertainty principle. By the time you lock on its position, the momentum would have taken it far ahead. What constitutes the continuous success of Salesforce.com is no more an enigma. It has transformed itself from a Customer Relationship Management platform to a Customer Experience Management Platform with new advents in strategy as well as technology; especially with the addition of AI.

Software solution providers are moving towards a customer centric model where experience of a customer is deemed most important. Such an experience encompasses not only the visual presentation but also the functionality and ease of using it.

Consistently getting featured as first or second in the Forbes list of most innovative companies in the world, across all industries and regions is the proof of its brawn in directly influencing the technology and the market.

Until recently, the experience of a Salesforce user did not differ from that of his peer in functional terms. The data for each user could be different, but the experience they gain out of the data was the same within the persona (such as a Sales Executive). Salesforce has taken a strategic move in offering AI. This inclusion now provides a user the personalization element in the CXM, as predictions are not only dependent on data, but also on the individual user's use of the functionality.

Out of all the CRM applications, SFDC is the most successful one and enjoys the highest average subscription price among the competitors. In this article, I will be trying to appraise how SFDC provides the best experience in the realm of CXM.



We will start by looking at some of the major transformations SFDC has gone through in the recent years, and thereby being termed as the 'Lightning Experience'.

## User Interface

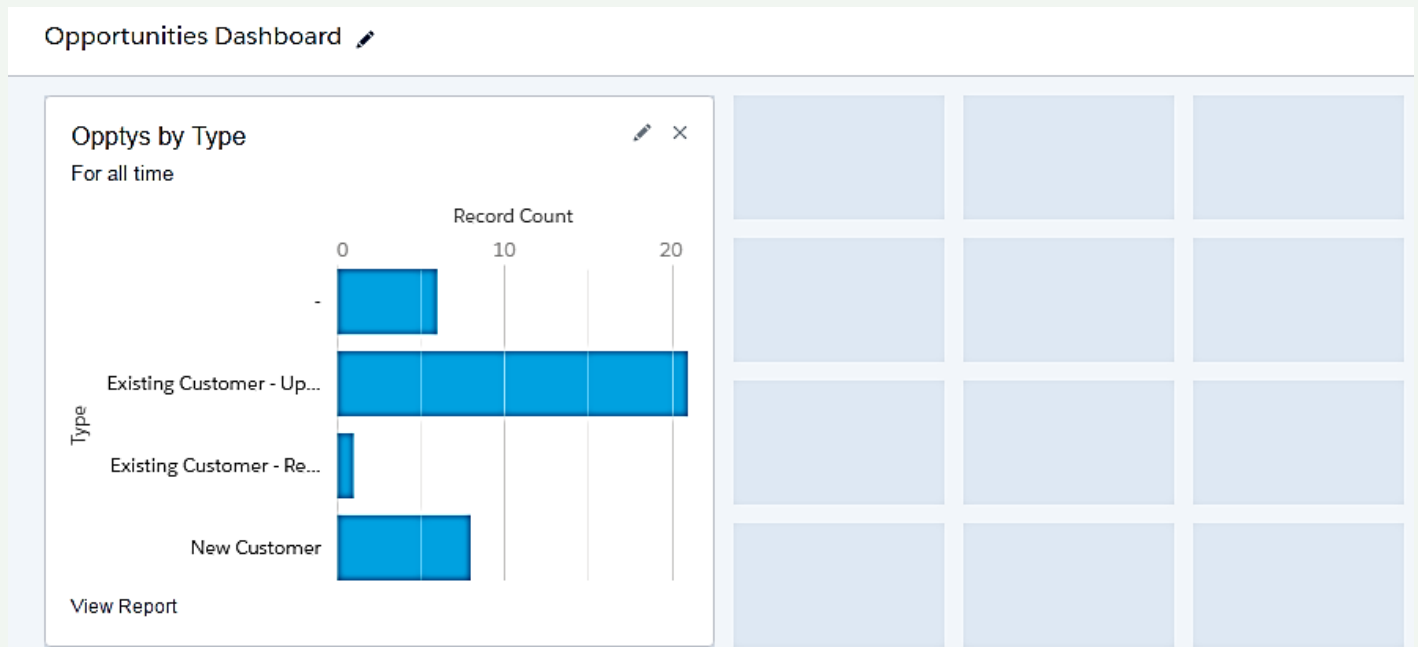
### Material Design Principles

Salesforce adopted the new design across its various platforms of mobile, Lightning UI and even the logo. They now represent the material design metaphor of rationalized space and system of motion.

The color choices, edge-to-edge imagery, grid bases styling, large scale typography and intentional white space create a bold and graphic interface that immerse the user in the Material Design experience.

Here is a sample of a dashboard edit page from Lightning UI. It epitomizes the

material design principles in choices of color (Lightning still does not allow user to edit the default colors in dashboards unlike Classic. It only allows shades of blue), Grid based styling that allows different sizes for charts by importance (vs rigid options in classic).



## Logo

The material design influence is evident in the new Salesforce logo as well.

The gradient, bevel, reflection shine, glow and shadow are dropped for a clean, print-based flat design. It indeed is a welcome change and much easy on the eyes. Among the most successful companies across the

world, it may be difficult to find anyone other than Salesforce who has changed their representative logo so many times over the years. This is also an indication about Salesforce not being avert to any

kind of disruptive changes, as we have seen from their innovations as well.

Apart from the iconography and color palettes, Salesforce rebranded themselves in typography as well.

## Typography

The font family too was being carefully selected. Choosing a sans-serif font was a no-brainer as it has become a widely accepted standard. The minimalistic character of the font matches with the rest of the design elements.

Salesforce1 had thus licensed Proxima Nova Soft Regular. The mobile experience hence uses a font that is much friendlier to use. In the words of its creator Mark Simonson - the font works best in situations where you want something invisible and doesn't call attention to itself. It doesn't really convey much beyond the words you set it in – and that fits rightly in a mobile app that should be in the hands of various users in the field when it

needs to deliver content just as it is. The lightning UI, currently, uses a bespoke font that is custom developed for Salesforce – Salesforce Sans. This is now made available to developers through LDS as well. The rounded edges of alphabets in the font greatly increases the friendliness of the user interface coupled with the spacing. This is very similar to the fonts used in android apps and material design based websites.

## Design Choices

Micro-moments are game changers in how a user consumes data. It has changed the consumer journey into hundreds of real-time intent-driven micro-moments.

Salesforce has invested in a responsive

experience in the Lightning UI as well. The needs are defined in-the-moment with the main asks being “What would make this easier or faster? What content or features will be most helpful at this moment?” Salesforce has responded positively in the design choices for Lightning UI. The buttons and the actions are significantly different in the new UI also addressing the needs of the desktop user. The motion element in the Lightning UI is the highlight of the design. It flows from a screen to another and within elements of the same screen. The drag and drop options greatly increases the productivity.

Instead of being a simple data wrangler, if Einstein can prove to be a productivity enhancer and perform automated tasks, it will go a long way in making the micro-moments count in Salesforce.

One of the lowlights of the Salesforce classic was that it looked like a digital printable form for representing a record.

Account ABC

Hide Feed

Post File Link Poll

Write something... Share

Following Followers Show All (1)

Show All Updates

There are no updates.

Contacts [0] | Services [0] | Service Orders [0] | Open Activities [2] | Activity History [1] | Notes & Attachments [0]

**Account Detail** Edit Delete

Account Owner	Ragesh Vellat [Change]	Rating	
Account Name	ABC [View Hierarchy]	Phone	3023023023
Parent Account		Fax	
Account Number		Website	http://ABC.com
Account Site	ABC-London	Ticker Symbol	23er
Type	Customer - Direct	Ownership	Private
Industry	Apparel	Employees	4,567
Annual Revenue		SIC Code	

The new UI beautifully transforms a record into a functional space with chatter, activity, related lists and details available without having to scroll vertically.

The screenshot shows the 'ACCOUNT' record for 'ABC'. At the top, there are navigation buttons: 'Following', 'Edit', 'Change Owner', and 'Delete'. Below this is a summary row with fields: Type (Customer - Direct), Phone ((302) 302-3023), Website (ABC.com), Account Owner (Ragesh Ve...), Account Site (ABC-London), and Industry (Apparel). The main content is divided into two tabs: 'RELATED' and 'DETAILS'. The 'RELATED' tab shows fields like Account Owner (Ragesh Vellat), Account Name (ABC), Parent Account, Account Number, and Account Site (ABC-London). The 'DETAILS' tab shows fields like Rating, Phone ((302) 302-3023), Fax, Website (ABC.com), and Ticker Symbol (23er). To the right, there are two sub-tabs: 'ACTIVITY' and 'CHATTER'. The 'ACTIVITY' tab shows a 'Filter Timeline' dropdown, a 'Next Steps' section with a 'More Steps' button, and two activity items: 'Renew Contract' (dated May 19, 2011) and 'Reminder' (dated May 17, 2011).

Sending an email in classic took at least 3 clicks from the Account details section and a page load as well. The new UI allows the emailing in a single step without even having to leave the details of the record.

The screenshot shows the 'CONTACT' record for 'Vellat'. At the top, there are navigation buttons: 'Following', 'Edit', 'Delete', and 'Clone'. Below this is a summary row with fields: Contact Owner (Ragesh Vellat), Name (Vellat), Account Name, Title, and Department. The main content is divided into two tabs: 'RELATED' and 'DETAILS'. The 'RELATED' tab shows fields like Contact Owner (Ragesh Vellat), Name (Vellat), Account Name, Title, and Department. The 'DETAILS' tab shows fields like Phone, Home Phone, Mobile, Other Phone, and Fax. To the right, there are two sub-tabs: 'ACTIVITY' and 'CHATTER'. The 'ACTIVITY' tab shows a 'Send Em...' button and an email composition form with fields for 'From' (Ragesh Vellat <ragesh\_vellat@infosys.c...), 'To' (Cc), 'Bcc' (ragesh\_vellat@infosys.com X), and 'Subject' (Enter Subject...).

This could look like a simple change but the time and effort it saves for a busy Sales Executive is immense in their experience of functionality.

## What changed to enable this experience?

### 1. Transpose to Tabs

Classic represented data of records in a two column array with related information in lists below. For a start, classic had this right compared to any other CRM solution they had out there as a competition.

However, introduction of mobile apps for CRM probably changed the whole idea of

how data gets represented. Data needed to be compartmentalized into snippets to allow users to take in specific information at a time than displaying all data in one go.

While small or mid-level businesses may not have had complex data models influenced by ERP, I believe the transition of enterprise level customers, with complex data models which had a lot of relational data structure to be presented to the user, into Salesforce would have definitely influenced Lightning

transformation.

Lightning followed mobile-first design approach and Salesforce 1 app was out there following material design. Fixed headers and tab based browsing was also available in the classic world in Service Console UI which was highly productive for fast paced workers like call center agents. It was, thus, only natural to have the vertical scrolling to see a lot of different sets of information getting replaced by tabs in Lightning experience.

It is similar to transposing the information in an excel sheet with rows and columns. When you need to see more columns and need to sort them, one way of handling that in excel is to transpose the data. Salesforce transformation to Lightning followed the same tactic. One

still had the related lists in the related tab, but all information is neatly tacked on to different tabs and then there are more tabs within tabs. Related lists in lightning gets more space and allows display of information in a much better way than allowing 10 fields at a time which was

the case in Classic. Definitely the best usage of real estate you have on one page. Less scrolling, just more clicking, though.

represent the material design metaphor of rationalized space and system of motion.

Classic view:

The screenshot shows the Classic Salesforce interface with five stacked table views:

- Contacts:** A table with columns: Action, Contact Name, Title, Email, Phone. It shows one record for John Smith.
- Related Contacts:** A table with columns: Action, Contact Name, Account Name, Title, Email, Phone, Roles. It shows John Smith related to Acme Corporation.
- Opportunities:** A table with columns: Action, Opportunity Name, Stage, Amount, Close Date. It shows an opportunity named Acme Large Deal in the Perception Analysis stage with an amount of \$10,000,000.00 and a close date of 10/1/2018.
- Cases:** A table with columns: Action, Case, Contact Name, Subject, Priority, Date Opened, Status, Owner. It shows a case named 00001031 related to John Smith with the subject Billing Query, priority Medium, date opened 9/8/2018, status Working, and owner Ragesh Vellat.
- Open Activities:** A section indicating "No records to display".

Lightning tabs:

The screenshot shows the Lightning Salesforce interface for the Acme Corporation account. The account details are shown at the top, including Type (Prospect), Phone (+13023326951), Website (www.acme.com), Account Owner (Ragesh Vellat), Account Site (Wilmington), and Industry (Retail). Below the details, there are two main sections:

- RELATED:** A tabbed section with sub-tabs for RELATED, DETAILS, and NEWS. Under the RELATED sub-tab, there is a "Related Contacts (1)" section showing John Smith. Buttons for "New Contact" and "Add Relationship" are visible.
- ACTIVITY:** A tabbed section with sub-tabs for ACTIVITY and CHATTER. Under the ACTIVITY sub-tab, there are buttons for "New Task", "New Event", "Log a Call", and "Email".

## 2. Fixed Headers

It allows crucial data fields to be available at all times while a user views the related information provides context, which was missing in classic UI. Lightning allows the header information to remain intact while related information and details of the record are being viewed or updated. A huge plus for the end user.

Viewing Related Contact John Smith in Classic Vs Lightning

Parent Account		Fax	
Account Number	302332	Website	<a href="http://www.acme.com">http://www.acme.com</a>
Account Site	Wilmington	Ticker Symbol	
Type	Prospect	Ownership	Private
Industry	Retail	Employees	
Annual Revenue		SIC Code	
Support Plan Start Date			
Billing Address		Shipping Address	
Customer Priority		SLA	
SLA Expiration Date		SLA Serial Number	
Total Number		Upsell Opportunity	
Active			
Created By	<a href="#">Ragesh Vellat</a> , 12/8/2017 3:50 AM	Last Modified By	<a href="#">Ragesh Vellat</a> , 9/8/2018 3:10 AM
Description			
Custom Links	<a href="#">Billing</a>		

[Edit](#) [Delete](#) [Include Offline](#)

Action	Contact Name	Title	Email	Phone
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">John Smith</a>			

Action	Contact Name	Account Name	Title	Email	Phone	Roles
<a href="#">Edit</a>   <a href="#">View Rel</a>   <a href="#">Delete</a>	<a href="#">John Smith</a>	<a href="#">Acme Corporation</a>				

Account **Acme Corporation** [+ Follow](#) [Edit](#) [New Contact](#) [New Note](#)

Type: Prospect | Phone: +13023326951 | Website: [www.acme.com](http://www.acme.com) | Account Owner: [Ragesh Vellat](#) | Account Site: Wilmington | Industry: Retail

**RELATED** | DETAILS | NEWS

**Related Contacts (1)** [New Contact](#) [Add Relationship](#)

[John Smith](#)  
 Account Na... Acme Corporation  
 Title:  
 Email:

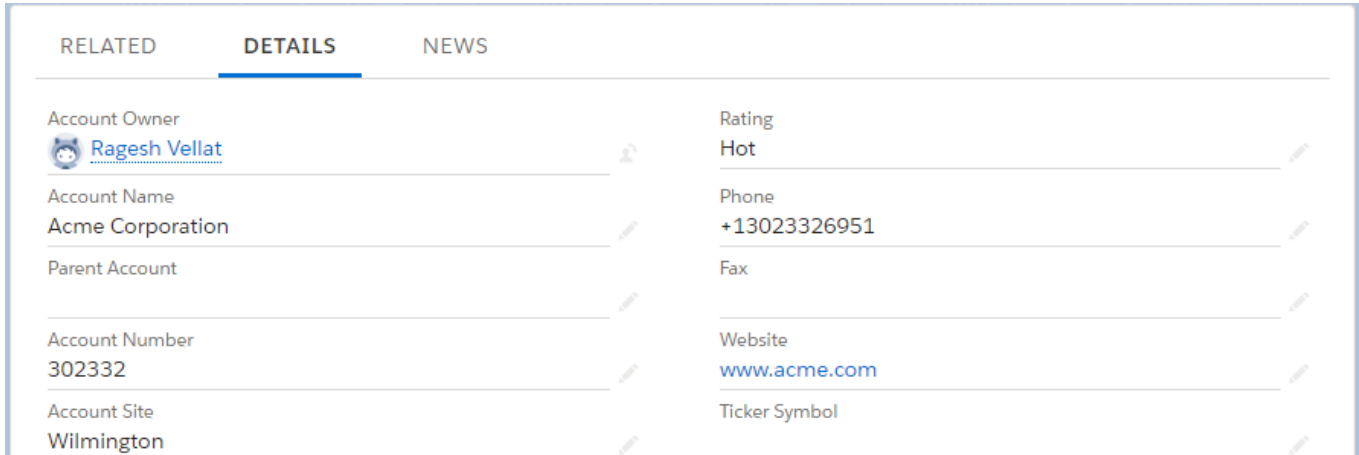
**ACTIVITY** | CHATTER

**New Task** [New Event](#) [Log a Call](#) [Email](#)

Create a task... [Add](#)

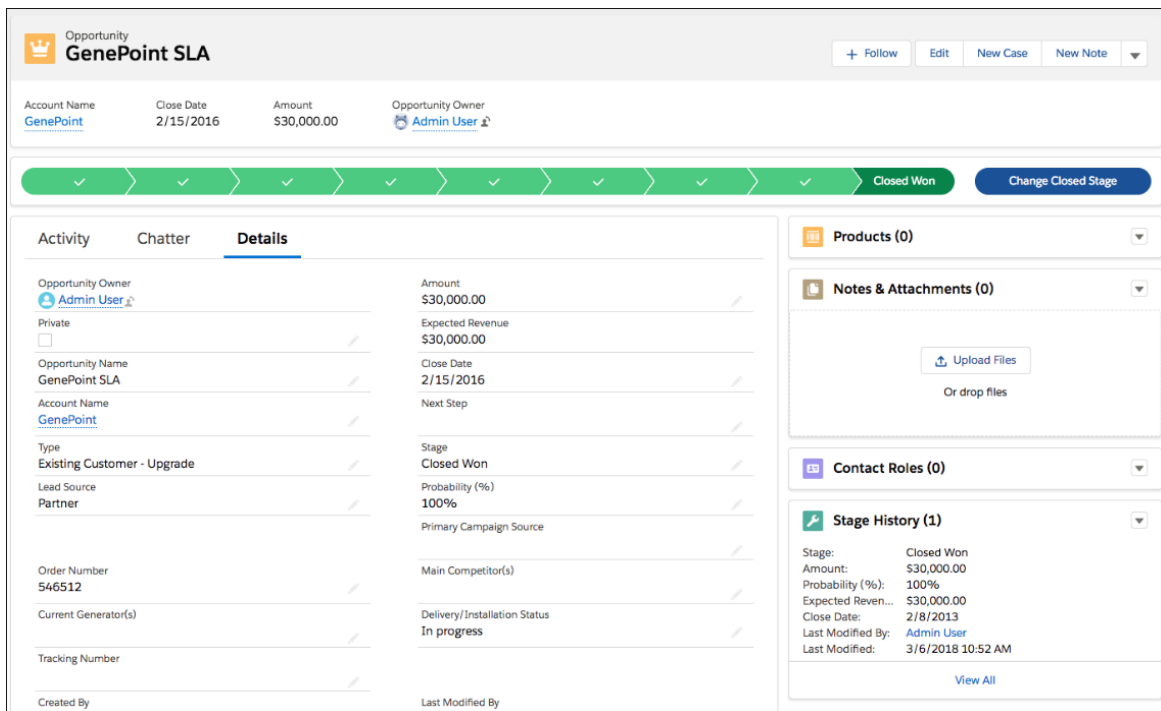
### 3. Field Density

Classic had this covered, didn't it? While Lightning Transformation got a cheer from those who wanted more space and not the tightly spaced fields in classic, there were many who were not very happy with the new design that didn't allow enough fields for the eye. While the fixed headers alleviated one problem, the two row spacing with field label above and value below occupied more space, indeed. The additional whitespaces between page elements seemed to aggravate the problem.



However, Winter '19 came with an early gift from Santa. A user could bring back the classic style of field spacing if he chooses to see more data that was compromised for the cleaner view until now in lightning. Each org would have a default setting and a user could change his preference from his profile.

Comfy setting:





Compact Setting:

**Opportunity GenePoint SLA** + Follow Edit New Case New Note

Account Name: GenePoint | Close Date: 2/15/2016 | Amount: \$30,000.00 | Opportunity Owner: Admin User

Progress: Closed Won | Change Closed Stage

**Details**

Opportunity Owner	Admin User	Amount	\$30,000.00
Private	<input type="checkbox"/>	Expected Revenue	\$30,000.00
Opportunity Name	GenePoint SLA	Close Date	2/15/2016
Account Name	GenePoint	Next Step	
Type	Existing Customer - Upgrade	Stage	Closed Won
Lead Source	Partner	Probability (%)	100%
Order Number	546512	Primary Campaign Source	
Current Generator(s)		Main Competitor(s)	
Tracking Number		Delivery/Installation Status	In progress
Created By	Admin User, 3/6/2018 10:52 AM	Last Modified By	Admin User, 3/6/2018 10:52 AM
Description	Delivery Status		

**Products (0)**

**Notes & Attachments (0)**

Upload Files  
Or drop files

**Contact Roles (0)**

**Stage History (1)**

Stage: Closed Won  
Amount: \$30,000.00  
Probability (%): 100%  
Expected Reven...: \$30,000.00  
Close Date: 2/8/2013  
Last Modified By: Admin User  
Last Modified: 3/6/2018 10:52 AM

[View All](#)

4. Visual Summary of Data

Data is meaningless without the ability to visualize and act upon it. Looking at a list view showed me what the data was in the list, but didn't provide any visual representation. While it may seem trivial, being able to see what the data in the list meant could enable or even enforce user to take action immediately.

Lightning allows report charts beside the list view, which is a great way to engage the user into the data. Users no longer have to depend only on Reports.

**Opportunities My Opportunities** New

32 Items • Sorted by Opportunity Name • Filtered by my opportunities • Updated 20 minutes ago

	OPPORTUNITY NAME ↑	ACCOUNT NAME	AMOUNT	CLOSE DATE	STAGE	OP...
1	Burlington Textiles Weaving Plant Generator	Burlington Textiles Corp of America	\$235,000.00	11/10/2015	Closed Won	RVell
2	Dickenson Mobile Generators	Dickenson plc	\$15,000.00	11/10/2015	Siebel Stage testing	RVell
3	Edge Emergency Generator	Edge Communications	\$75,000.00	11/10/2015	Closed Won	RVell
4	Edge Emergency Generator	Edge Communications	\$35,000.00	11/10/2015	Id. Decision Makers	RVell
5	Edge Installation	Edge Communications	\$50,000.00	11/10/2015	Closed Won	RVell
6	Edge SLA	Edge Communications	\$60,000.00	11/10/2015	Closed Won	RVell
7	Express Logistics Portable Truck Generators	Express Logistics and Transport	\$80,000.00	11/10/2015	Value Proposition	RVell
8	Express Logistics SLA	Express Logistics and Transport	\$120,000.00	11/10/2015	Perception Analysis	RVell
9	Express Logistics Standby Generator	Express Logistics and Transport	\$220,000.00	11/10/2015	Closed Won	RVell
10	GenePoint Lab Generators	GenePoint	\$60,000.00	11/10/2015	Id. Decision Makers	RVell
11	GenePoint SLA	GenePoint	\$30,000.00	11/10/2015	Closed Won	RVell
12	GenePoint Standby Generator	GenePoint	\$85,000.00	11/10/2015	Closed Won	RVell
13	Grand Hotels Emergency Generators	Grand Hotels & Resorts Ltd	\$210,000.00	11/10/2015	Closed Won	RVell

**Charts**

Pipeline By Stage

Amount: 5.8M

## 5. Kanban View

While the new styling was intended to be easy on developers as well as for consumers of the content, it also required something to break the monotonous view of the forms. One of the complaints of SFDC users have been the need for reading

between the lines of the large number of fields that fill the SFDC classic forms; especially with custom fields that control the Sales process for different companies.

Visual indications of what a record represents will go a long way from

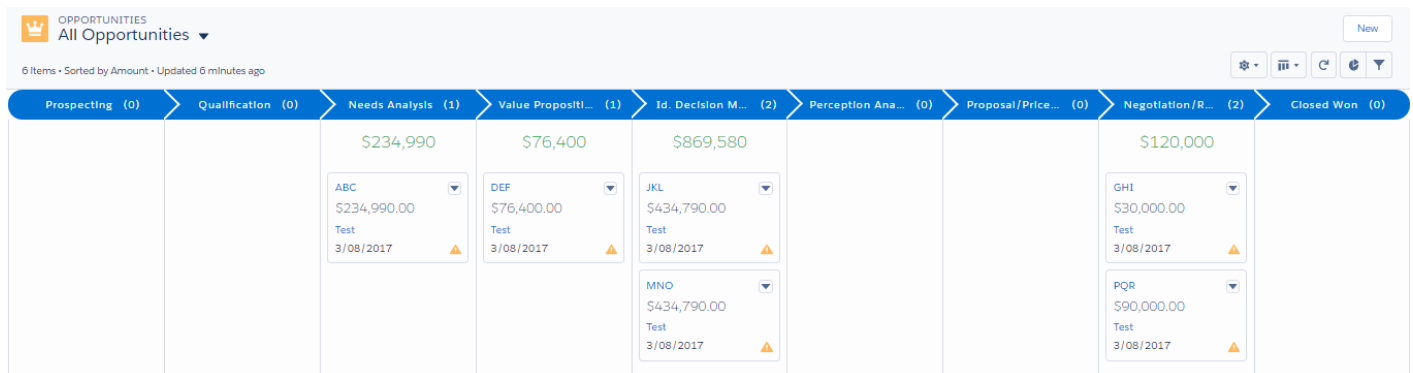
breaking that monotony. Kanban view suited the bill and it finds its place not only as a better communication medium, but also as a solution for identifying and reacting to bottlenecks in the process.

### Opportunity List View in Classic



Action	Opportunity Name	Billing Account	Amount	Close Date	Stage	Probability (%)	Type	Lead Source
Edit   Del   +	ABC	Test	\$234,990.00	3/08/2017	Needs Analysis	20	Existing Business	
Edit   Del   +	DEF	Test	\$76,400.00	3/08/2017	Value Proposition	50	Existing Business	
Edit   Del   +	GHI	Test	\$30,000.00	3/08/2017	Negotiation/Review	90	Existing Business	
Edit   Del   +	JKL	Test	\$434,790.00	3/08/2017	Id. Decision Makers	60	Existing Business	
Edit   Del   +	MNO	Test	\$434,790.00	3/08/2017	Id. Decision Makers	60	Existing Business	
Edit   Del   +	PQR	Test	\$90,000.00	3/08/2017	Negotiation/Review	90	Existing Business	

### Opportunity Kanban View



In effect, there was a DBMS Normalization methodology applied to the list view of Opportunity, picking the fields that will have the most redundant data and used that as the header in the Kanban View. The default setting is on the standard pick list field of stage and other active pick lists can be used to group the data as well.

Apart from the post-it notes under each section, this allows the drag and drop

options which works well with the concept of micro moments rather than opening records and editing them using multiple clicks to move it from one stage to another, in the classic mode.

For a Sales team, the saggy bucket of work-in-progress items is the biggest bottleneck. The dormant records can stay in such buckets for a while before having to manually audit and actionize. Kanban View

solves that problem as well with alerts, although this view is not customizable currently. With assistant and AI supporting this, it will definitely be a big productive boost for the sales user. What the developers had to do with their own styling and logic for flagging important information for a user, is now available easily in the Kanban view and on assistant.

## 6. Templating

Community design has been templated by SFDC and it serves the purpose of reducing the complexity of the developer to design a page as well as having SFDC take care of the changes to the UI elements over time.

The same principle is applied in making Lightning Design System available to developers to make the Visualforce pages look similar to Lightning UI. This ensures that the developer doesn't have to do the hard work of CSS and design, as Salesforce has done it for them. It also ensures that end users always experience Salesforce UI in a similar way across the Lightning UI, Custom Pages as well as mobiles. These

three elements used to give a different UI experience to the end user and makes the adaptation to a new platform difficult. This change alleviates that problem by giving a single UI experience.

This is a common principle derived from the DNA of Salesforce. From the initial Salesforce avatar as a Sales Solution, different cloud SKUs Salesforce has introduced were templated solutions that could jump-start digital transformations. They had solutions that could be readily used without spending time and money on new development. This allows much easier adoption apart from offering very low time-to-market windows.

SFDC has done for developers what ghost.

org did for online publishing. It rightly allows developers to be free of styling worries and concentrate on content.

*A few more items in my wish list for accessing Data in Lightning*

- Dynamic filters on List Views such as those on Reports for changing timelines to see different results, without having to create and save the list view
- Ability to see the record from List View as a pop-up to the record detail and ability to edit from that Modal
- Allow Horizontal scrolling on Report tables with identifier column frozen in place
- Ability to define what tabs get displayed in communities based on record type

*I believe that the transformation to the aptly titled Lightning UI is still only half way through. There is a lot of innovation happening in the micro-moments and material design methodologies which will quickly make its way into Lightning UI. The customization of how a business sees its data is undergoing a revolution. 'Customer 360-degree view' proposed in the recent Dreamforce will be influenced how that 360-degree is presented on the UI. I am expecting lightning to get a lot more ready-to-customize modals that allows each business to view its customer the way they want to see it.*

*In the next part, we will look at other adventures of Salesforce and expectations.*

For more information, contact [askus@infosys.com](mailto:askus@infosys.com)



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