

Introducing the
Lightning Experience:

A Whole New Salesforce, A Whole New Way to Sell



Introduction

When the first CRM systems were created, they were primarily a tool for managers. A sales manager would monitor the basic functions of THE team and have some sense of what THE sales cycle was like throughout the quarter.

Fast forward to present day, and CRM systems such as Salesforce are light-years ahead of where they began. No longer a tool just for managers, CRM systems are powerful tools that can be leveraged by sales professionals, field reps, operations specialists, and employees at all levels. Reporting, dashboards, forecasting, activities – all this functionality is standard out of the box.

And yet, the sales world is constantly changing, and so are the demands of customers. With all of that as inspiration, Salesforce has evolved– again– into a CRM that makes you sell faster, smarter and exactly the way you want to. This new stage in Salesforce's evolution is a culmination of everything we're about: speed, intelligence, innovation, and success. In the following pages, we'd like to introduce you to the Lightning Experience – A Whole New Salesforce, A Whole New Way to Sell.



Chapter 1

Sell Faster

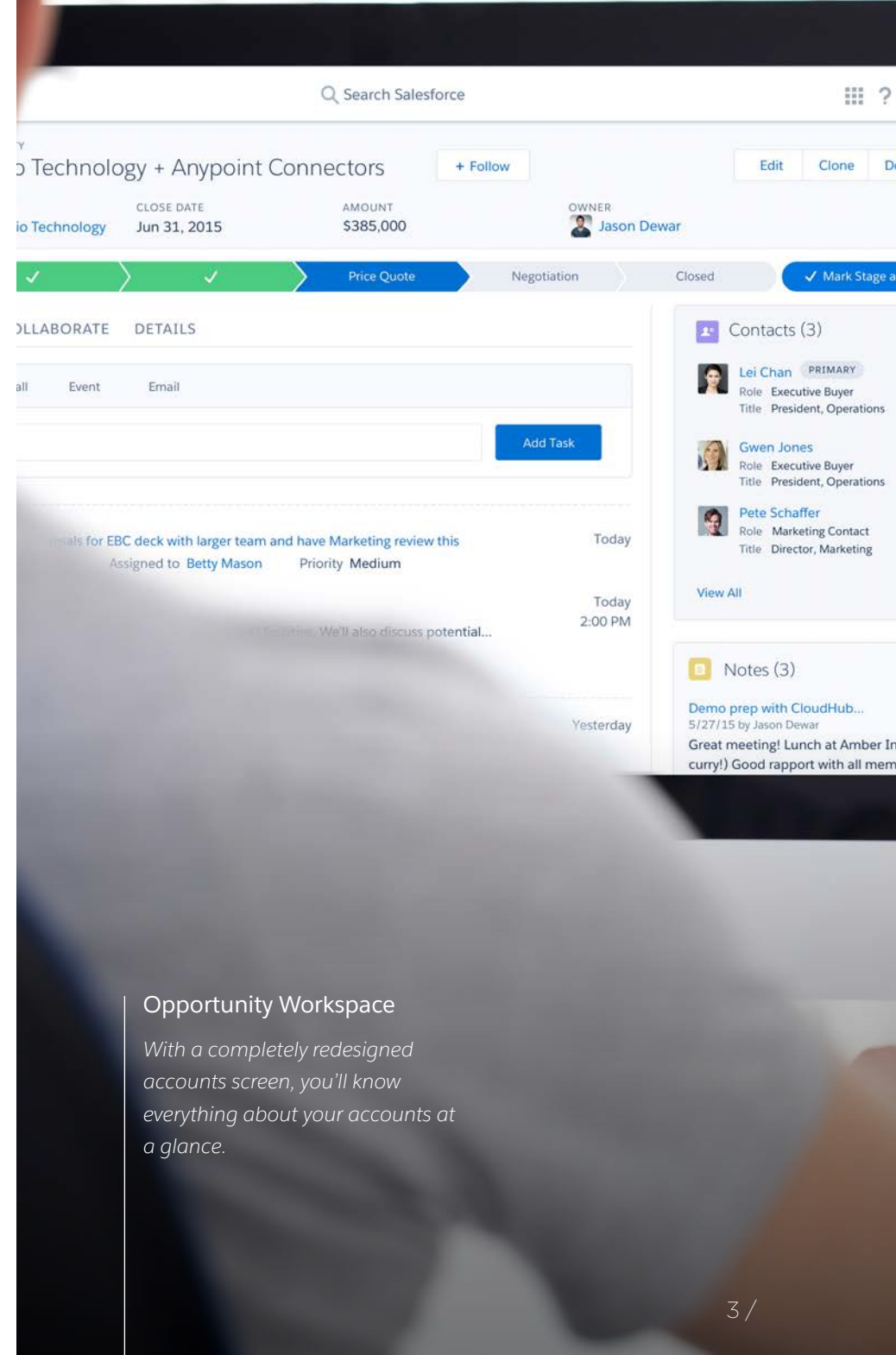
Today, the sales game is all about speed. Many times a competitive deal will go to the most responsive sales rep when all other things are equal. However, getting there first with everything you need to close the deal is challenging. With the help of our new Lightning Experience, you can turn that challenge into a business-as-usual experience.

Never Lose Data, Never Lose a Deal

For too long, CRM systems have been reactive. Having a record of every interaction with a prospect is invaluable to a sales professional, but the process of logging that information could only be done manually, and therefore it was incredibly time-consuming. What if all that useful information could be recorded automatically?

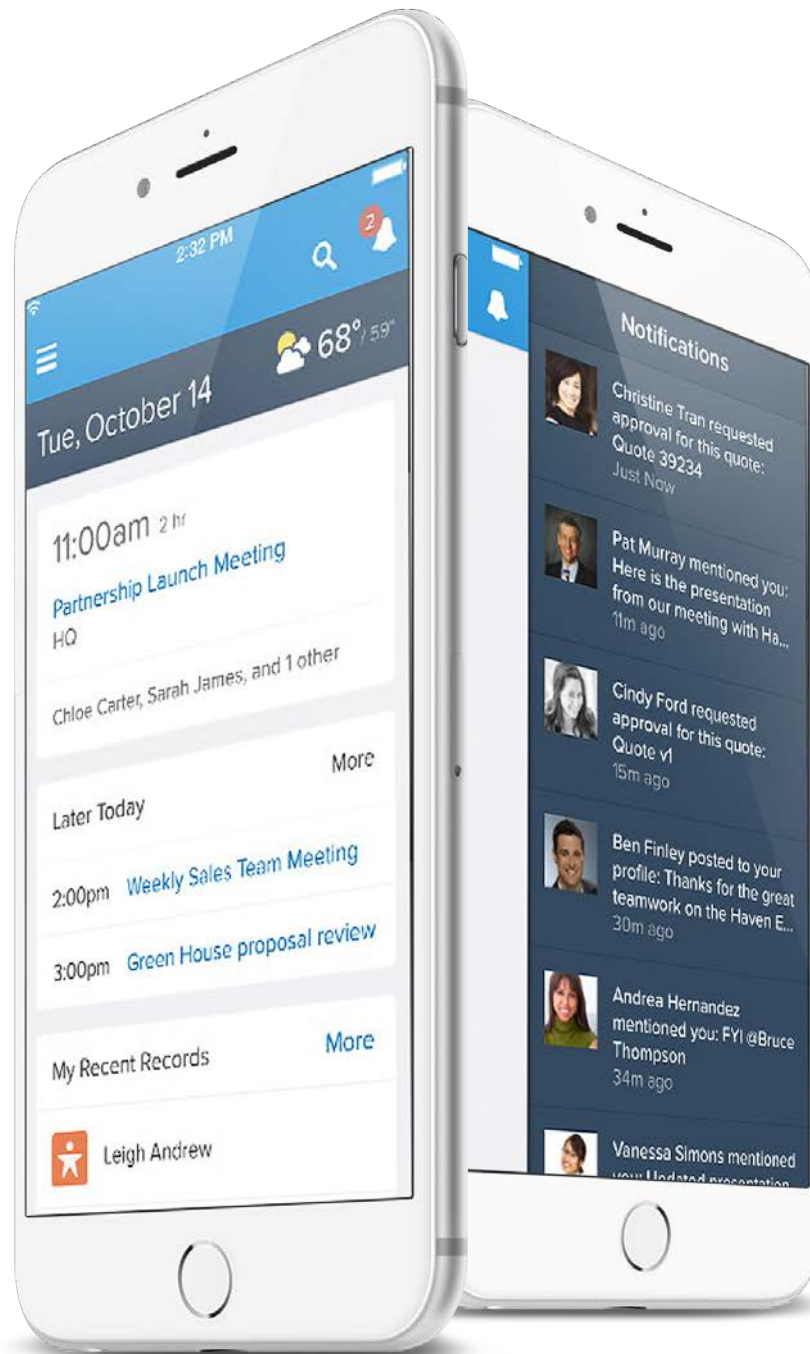
Well you don't have to wonder. The Lightning Experience knows the information that will be most helpful to you throughout the sales process and records it automatically so you never lose data— and never lose a deal.

“Lightning is all about being proactive.”



Opportunity Workspace

With a completely redesigned accounts screen, you'll know everything about your accounts at a glance.



Data Exactly Where You Expect It

This new brand of proactive CRM extends far beyond eliminating manual information entry. The Lightning Experience also provides you the most up-to-date information, right when you need it. Wondering how you are performing relative to this quarter's quota? No more clicking and filtering to get the answer. A simple chart will show your progress, straight from the home screen. In fact, the entire home screen has been reimagined to provide the most relevant information from the moment you log in. Want a list of the day's task and appointments? You've got it. Top deals in the pipe? No problem. The lightning experience even surfaces relevant news articles relating to your open accounts so you're always in the loop.

Having all this information delivered directly to you instead of manually recorded or arduously tracked down means one thing: You spend more time selling. Too often sales professionals spend their days focused on the administrative side of the business instead of selling. The Lightning Experience flips that script forever and makes Salesforce a selling tool designed to serve and support the user at every turn.

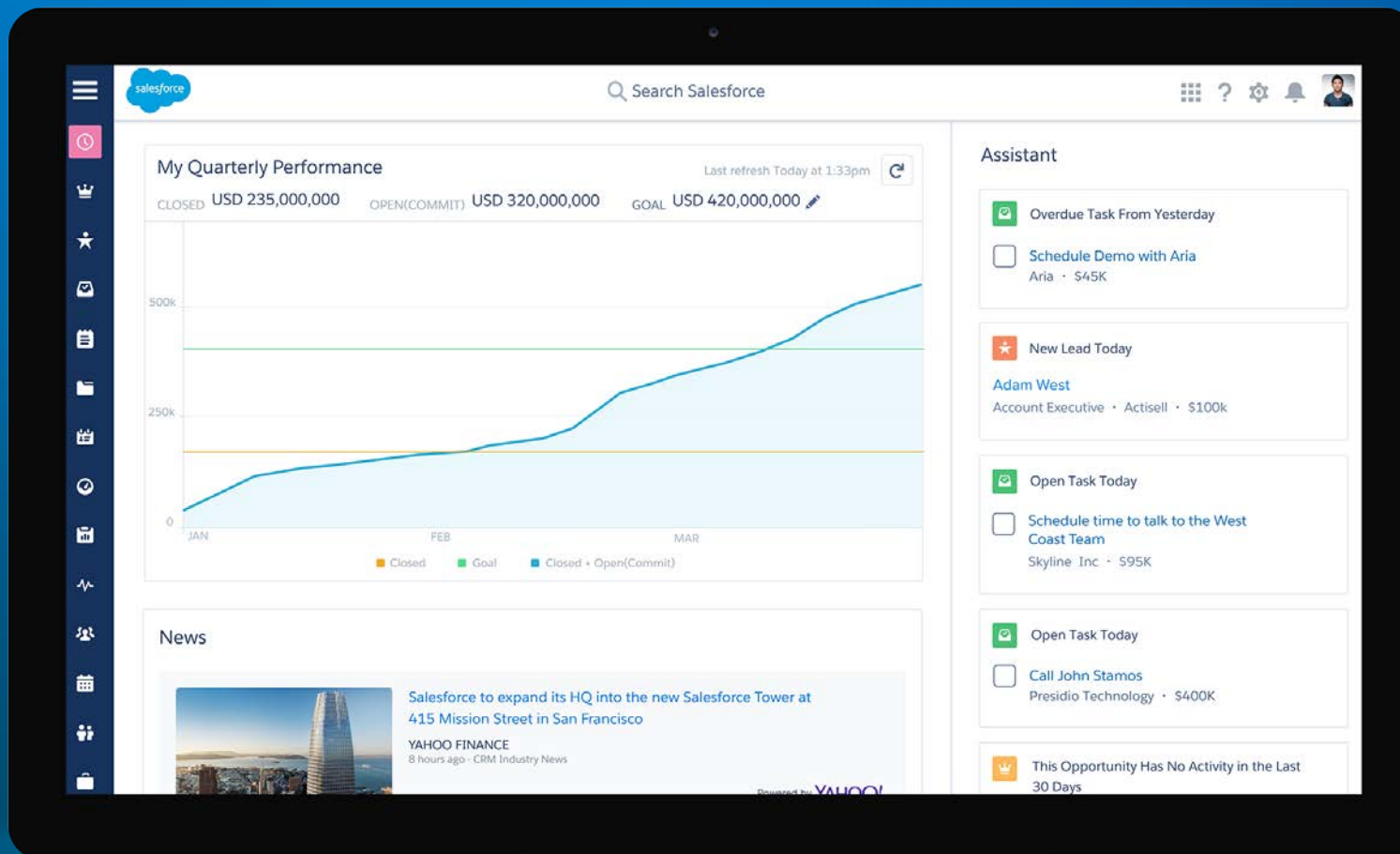
The Lightning Experience also makes it a point for your entire team to be collaborative. So although you didn't enter data, your teammate might have, and it's right there, in real-time.

Mobile-first

Get the same great Salesforce experience no matter where you are or what device you're using.

Redesign Highlight: Home

The most noticeable change to the Salesforce user interface is the new Home screen. This screen was designed for one purpose: to provide the information you need most, right from the moment you open Salesforce. Home provides a personal assistant that proactively updates you on all relevant activity in your sales pipeline. You'll never miss a thing, whether it's an open task, a new lead, account activity, or a gentle reminder to reach out to a lead. You'll also know exactly where you stand when it comes to your quota, thanks to the helpful performance graph. Other highlights include news relevant to your accounts, a list of top deals, and a list of your most recent records. Now, you'll be able to hit the ground running, every day.



Features

Relevant news updates

Quarterly performance

Assistant

Top Deals

Task reminders

Account updates

Recent accounts

Focus Sales on Your Most Important Leads

As CRM solutions have evolved in the last few years, there has been a dramatic influx of new data. Marketing automation solutions are providing dynamic new insight into how and when prospects interact with your company. However, all that data means very little if it can't be called up on demand. The Lightning Experience doesn't just make finding the right information easier, it makes it instantaneous.

When a prospect completes an action, like opening an email or visiting your website's pricing page, Salesforce immediately alerts you in a real-time feed that now is the perfect time to reach out to your prospect. This allows your team to focus its selling efforts on the leads most likely to close—and do it at the best possible time.

Prospect activity isn't the only aspect of marketing automation that's being updated and streamlined by the Lightning Experience. Lead nurturing with drip email campaigns has also gotten a lot easier. Sales reps can now assign leads to existing nurture journeys, even from their phones. Marketing can collaborate or lead the creation of these nurture journeys to ensure that prospects are receiving the freshest and most useful marketing content. Meaningful collaboration between sales and marketing results in a better overall experience for the customer.

Sell from Anywhere, On any Device

Not too long ago, being away from your computer meant you were only armed with what you were able to cram into your bag or briefcase. Now, with a mobile CRM solution, you can access all your customer and company data at any time, allowing you to keep in touch with more prospects and collect new and relevant information in real time. Being able to update your CRM on location instantaneously replaces that tedious task at the end of the day), with a simple process that ensures you always have the most current information at hand. Access to this information provides sales reps with a number of advantages.

The tools you use most should work the same across all of your devices and feel like a consistent experience on every screen. With Salesforce responsive design, you also get the same experience no matter where you are or what device you are using.

Quick Summary:

How does the new Lightning Experience help you sell faster?

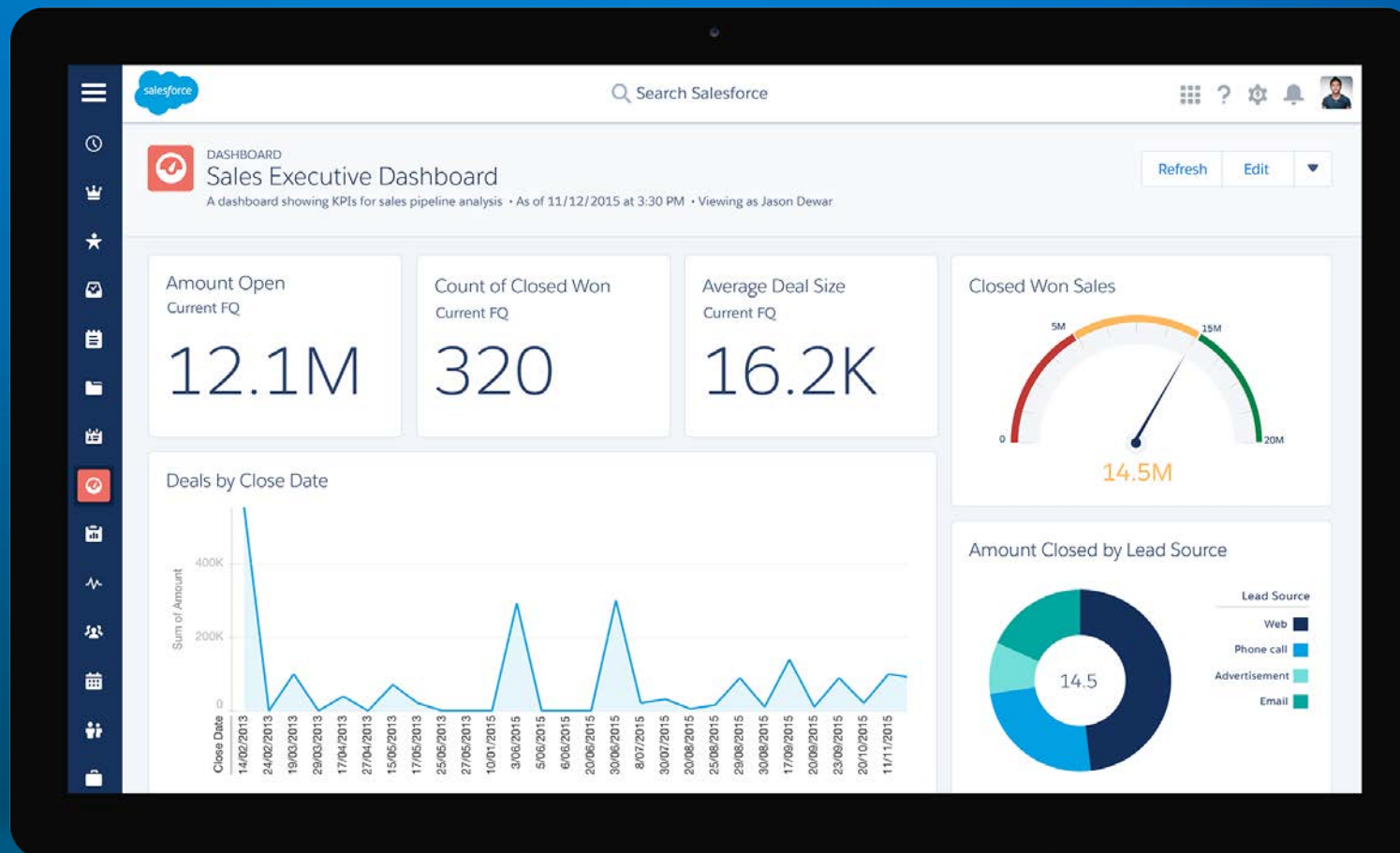
- ⊕ Lightning is proactive, handling the busy work so you can spend more time selling.
- ⊕ Lightning helps you prioritize the leads and information that are most relevant and important.
- ⊕ Lightning allows you to sell from anywhere, on any device.

Ready to learn more?

Learn more about how the Salesforce1 Mobile App helps you sell from anywhere with the free e-book, [Spend More Time Selling with Salesforce1.](#)

Redesign Highlight: Sales Dashboard

Dashboards have been one of the most popular features of Salesforce since they were first introduced. The new Lightning Experience improves upon the dashboards you already know and love, and includes new features that users have been waiting for. Tired of the standard three-column layouts for Salesforce dashboards? Well, Lightning allows you to add columns to your heart's content. Easily resize elements across columns and rows with a simple click and drag. Lightning also features updated designs to the graphs and modules your familiar with, and adds a few new ones.



Features

Add more than the standard three columns

Redesigned graphs

New modules

Improved customization

Chapter 2

Sell Smarter

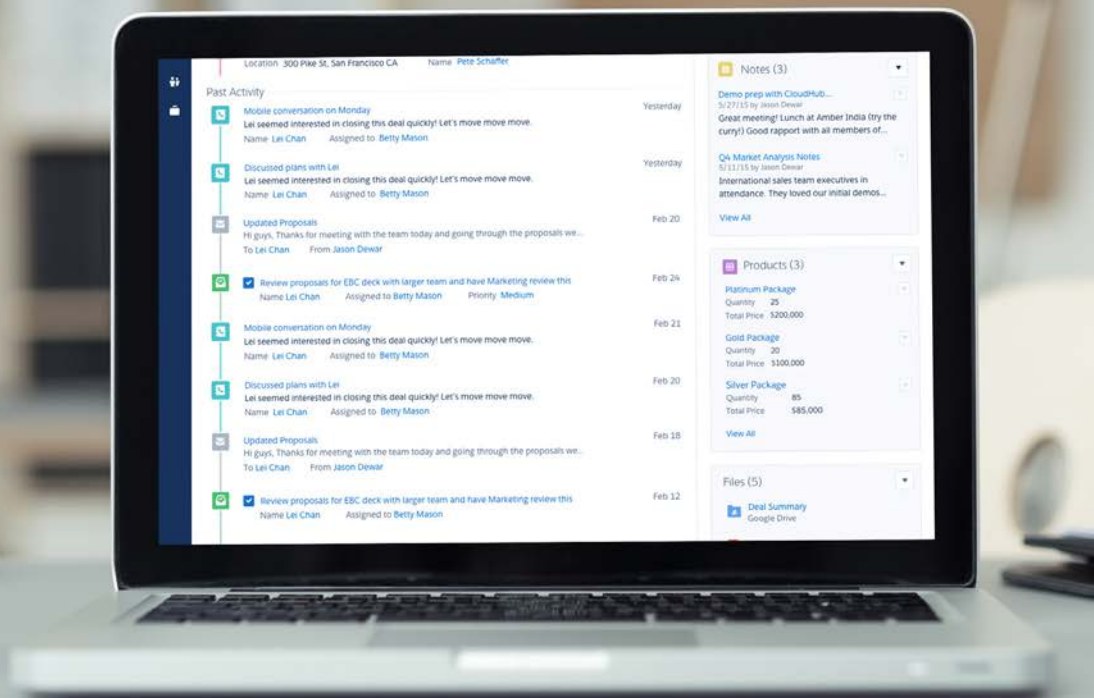
There's no doubt that we are living in an era where everything must be quantified. Terms like “big data” and “analytics” are being thrown around in every industry and for every job function. All this data holds a lot of promise for today's business professionals. The reality of improved accuracy, the prospect of increased efficiency, and the dream of improved efficacy are all on the minds of today's modern professionals as they rush to embrace this new data-driven era. At the forefront of all this clamoring for more data is the sales organization. At the end of the day, companies should look to leverage data first with their sales teams.

However, many companies don't know where to start when looking to incorporate data into their sales operations. With the Lightning Experience, Salesforce has finally made data front and center. The Lightning Experience makes data more accessible across all aspects of your CRM, making every decision more informed, every insight more impactful, and every action more meaningful.



Dashboards

Dashboards on lightning are more customizable and beautiful than ever before, allowing you to leverage your data for smarter sales and more success.



Accounts

It's easier than ever before to get the information you need most about your accounts with activity timelines and even suggest next steps.

Turn Every Interaction into an Opportunity

Prospects are now engaging in more ways and through more channels. They expect to have their sales experience tailored to meet their needs at every stage and on any channel. This means modern sales professionals need to not only understand where their prospects are in the sales process, but how to tailor their approach to each stage. The Lightning Experience makes this process a breeze by helping identify sales stages, surface the right data, and suggest guidance. It also gets you ready for any selling moment. And nowadays, those moments can happen at any time and at any point along the sales cycle.

Every sales rep knows that each stage of the buying process requires a slightly different approach. That's why Lightning breaks down the right steps to take at each stage and the data you need to take action. Moving a deal forward is the most important part of any sales activity and was once the biggest challenge. But not anymore. From suggested next steps to the perfect piece of content, Lightning makes moving your deals through the pipeline that much easier..

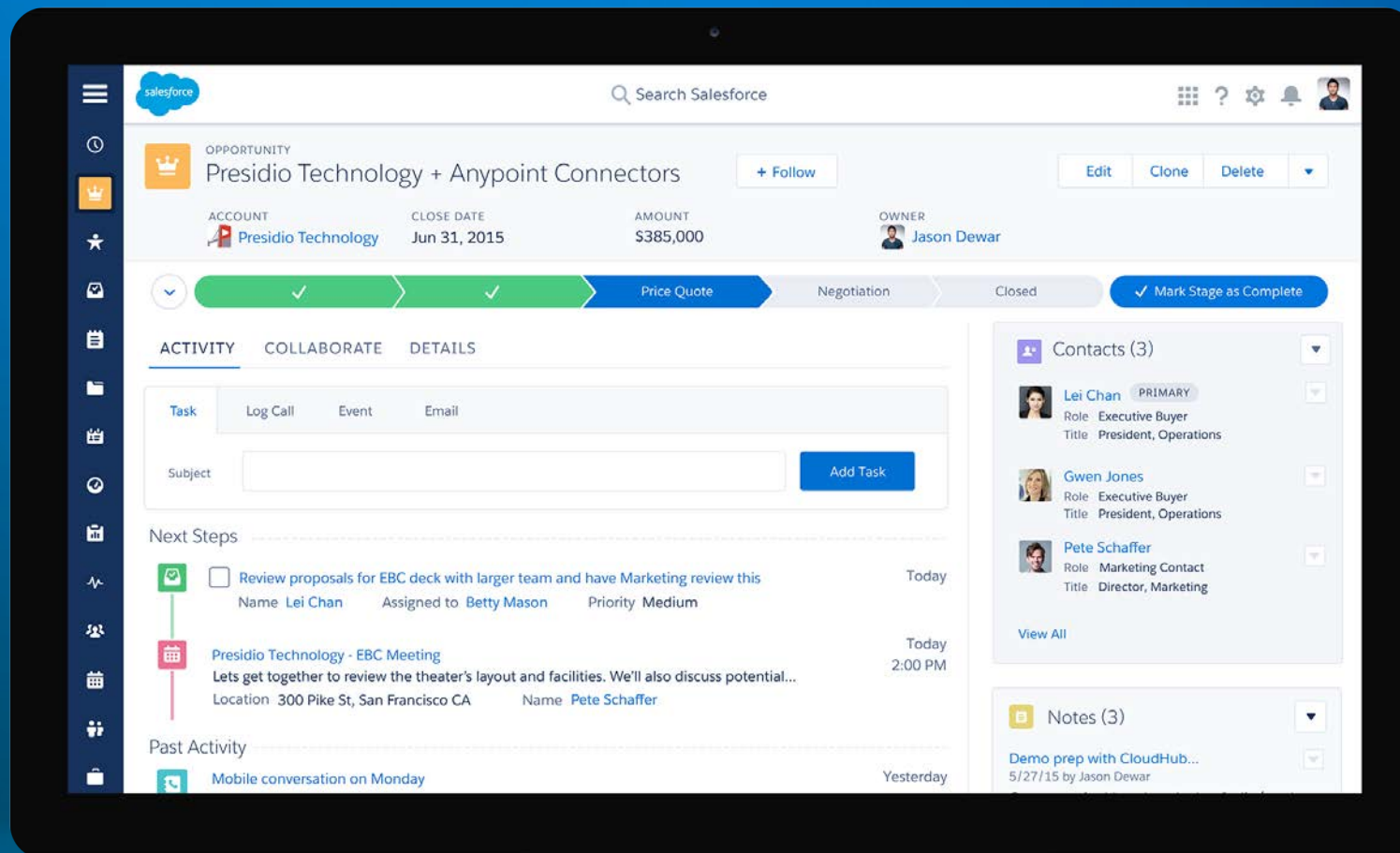
Gain Insight with Real-Time Analytics

Analytics has long been the domain of IT or specialized data teams; it's viewed as far too complex to be used by the average sales professional. But as the amount of accessible data has skyrocketed, analytics has become too valuable a tool to keep sequestered to a back office. Salesforce is bringing analytics to everyone with the Lightning Experience.

Want to identify opportunities to upsell within your existing customer base? No more submitting a request to the IT department and patiently waiting a few weeks. You can filter through data in seconds, drill down to the insights you need on your own, all from right inside Salesforce.

Redesign Highlight: Opportunity Workspace

The Lightning Experience provides a whole new view of your entire pipeline. Called the “Opportunity Workspace,” this new screen provides everything you need to close a deal. Understand at a glance where your deal is in the sales funnel with helpful visualizations. Get suggested next steps to keep deals moving. Log calls and send emails from inside the account workspace to automatically record events in the activity timeline. The Salesforce record for an account is no longer just a page to reference, it’s now command central for closing the deal.



Features

Next steps

Activity history

Call and email from inside an account.

Easy collaboration

Chapter 3

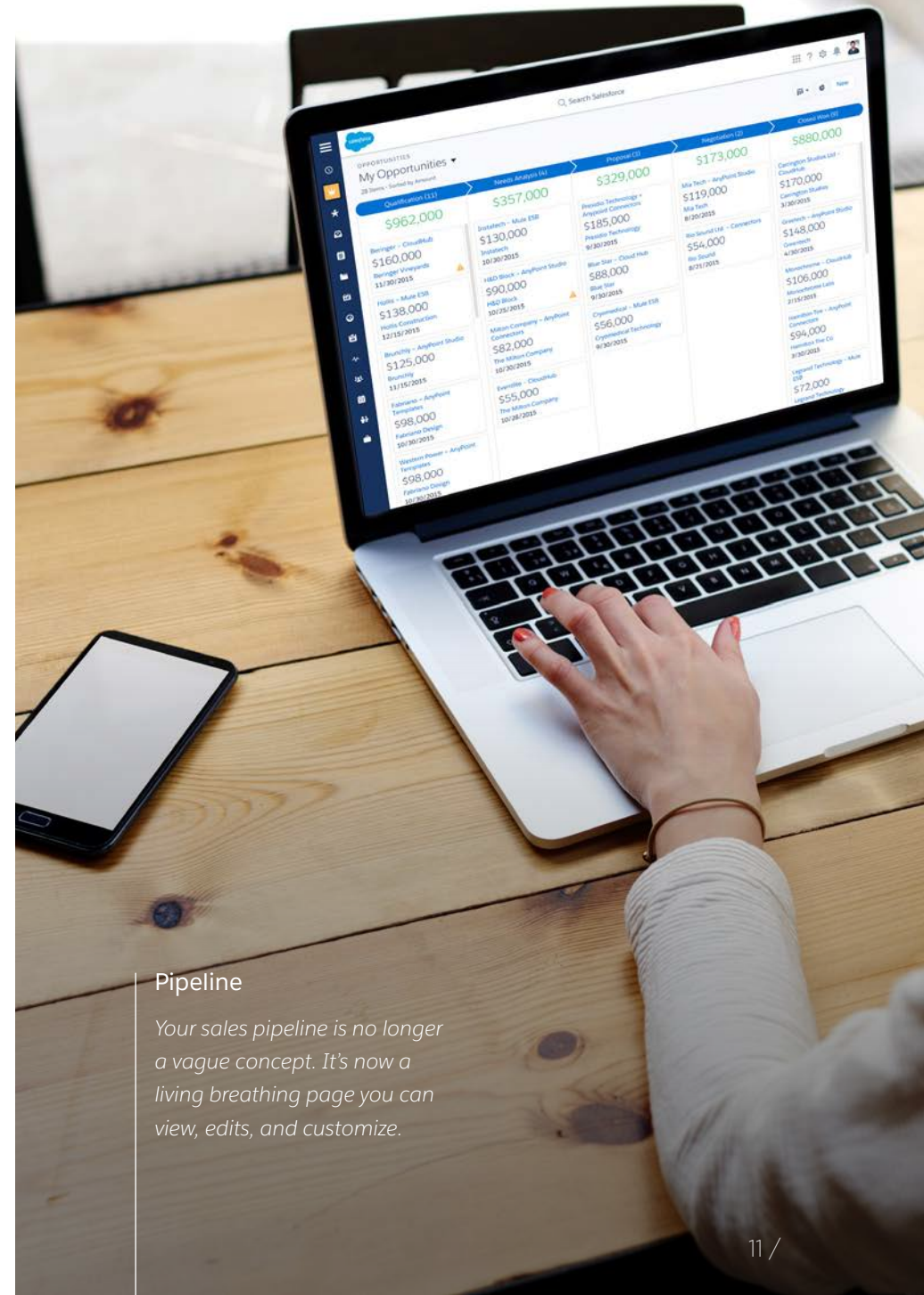
Sell the Way You Want

For too long sales organizations have tailored the way they sell to match their CRM when it really should be the other way around. That's why, above all else, the new Lightning Experience was designed so that anyone at anytime can customize their CRM, no matter the team, no matter the sales process. This allows our customers to be more effective, more impactful, and more successful.

Get a Central View of Your Customer

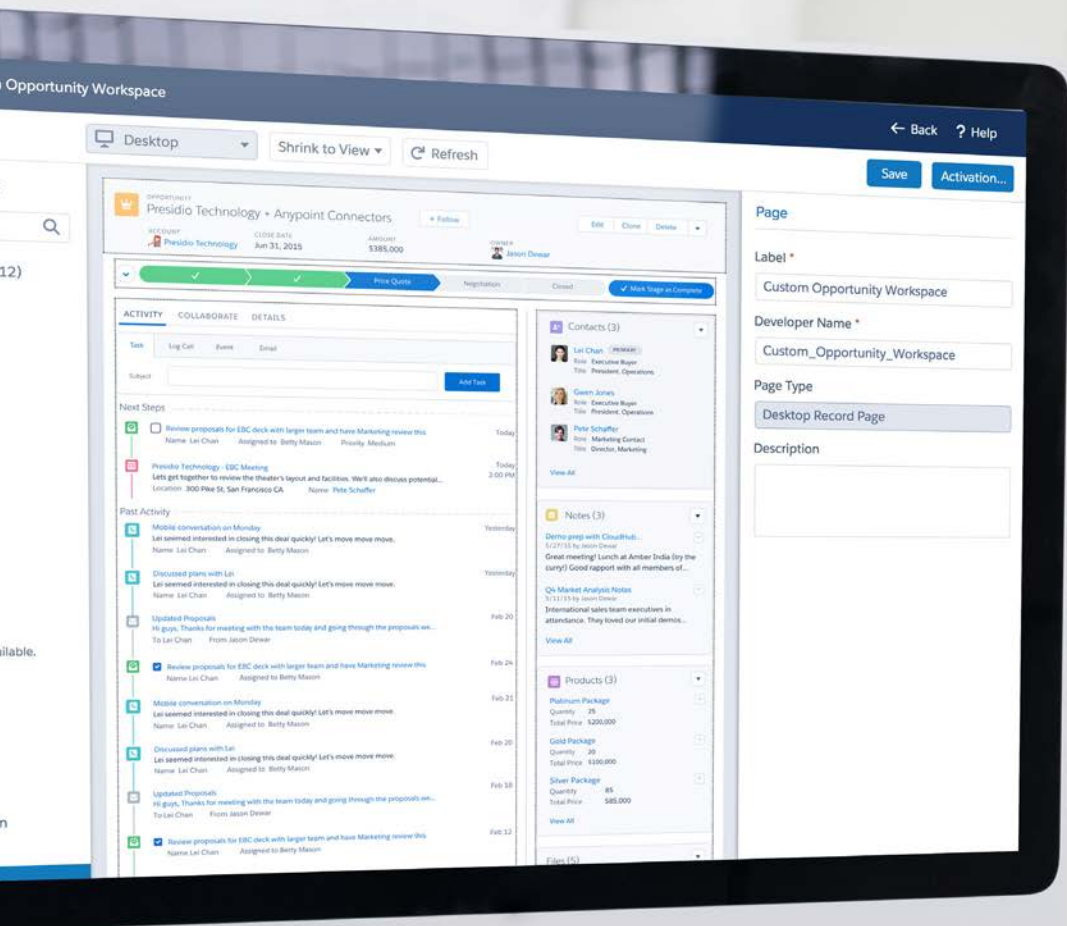
Recent research from CEB suggests that with the changing business environment, companies that rely on individual performance rather than team selling will see negative results. The study found that over a period of 10 years, from 2002 to 2012, the impact an individual's task performance has on a company's profitability dropped from 78 percent to 51 percent. In that same period, the effect of employee collaboration and "network performance" increased from 22 percent to 49 percent.

Collaboration allows your reps to tap into their team and network for advice, information, and expertise on the fly. Modern sales teams are more collaborative, with a team atmosphere that allows them to leverage their collective knowledge to outperform salespeople that are less connected.



Pipeline

Your sales pipeline is no longer a vague concept. It's now a living breathing page you can view, edits, and customize.



Social and collaborative

Salesforce gives sales reps the ability to collaborate and crowdsource intelligence and resources from their team in ways that weren't possible just a few years ago. With an internal social network such as Chatter, they can easily aggregate skills, insight, and expertise to close more deals and identify new opportunities. This type of collaboration can increase cross-selling, decrease sales cycle times, and bump up conversion rates.

This type of collaboration does not require any radical reorganization. Even in companies that have fully invested in a social sales force, their structure, processes, and metrics have remained mostly unchanged. The only difference is the engagement in a more social and collaborative method of selling, and the value of that social network increases dramatically the more sales people participate.

Accessible to other departments

In addition to transparency within the sales department, sales reps need to begin looking outside their borders for opportunities to share information and collaborate. With Salesforce, the sales department aligns more closely with the rest of the organization. Teams from across the office, or across the globe, can now work within shared tools, track progress with shared metrics, and collaborate in real time.

App Builder

Something about Lightning not working for you? No problem! Everything about Salesforce is customizable with a simple drag-and-drop builder.

The sales process no longer starts and ends with a sales pitch. The content created by marketing is just as important as the sales pitch, and the service your new clients receive after the deal has closed creates brand advocates who can uncover even more opportunities. To view sales as an isolated department does a disservice not just to your sales team, but to your customers. This is why Salesforce provides a 360-degree view of your prospects, from their first marketing touchpoint, to their most recent service inquiry.

Customize Sales Cloud to Work the Way You Want

When it comes to sales tools, they need to make the daily functions of the sales team easier to perform, and with greater efficiency. Nearly everything about the app is customizable, from the look and feel, to the apps and actions you can take. This means any learning curve is basically non-existent. Your sales team can login and instantly feel comfortable. The user interface will look familiar. The actions and verbiage will be consistent.

Set up custom actions in a blink

Many of the actions a sales rep takes each day can be very repetitive. You can easily create custom actions based on the activities you or your users need to perform most often. Create time-saving actions in no time. Choose from a library of popular custom actions or build your own. Tailor relevant actions for different roles. Keep your most important custom actions at the top.

Create any custom app and deploy instantly

Custom actions not enough for you? How about building entire custom apps you can use directly in Salesforce. Easily deploy all your custom objects, fields, and any apps you've integrated or built declaratively. Build new apps with clicks instead of code. No HTML, no CSS. Simple drag and drop builders make developing a custom app the work of minutes, not months. Quickly automate key processes with custom apps and make your sales team more efficient and powerful.

Find the perfect apps for your business.

One thing that has always set Salesforce apart from the competition has been the Salesforce AppExchange. You can implement thousands of third-party apps with the click of a button, making the functionality and customization of your Salesforce account infinite.

Quick Summary:

How does the Lightning Experience help you sell the way you want?

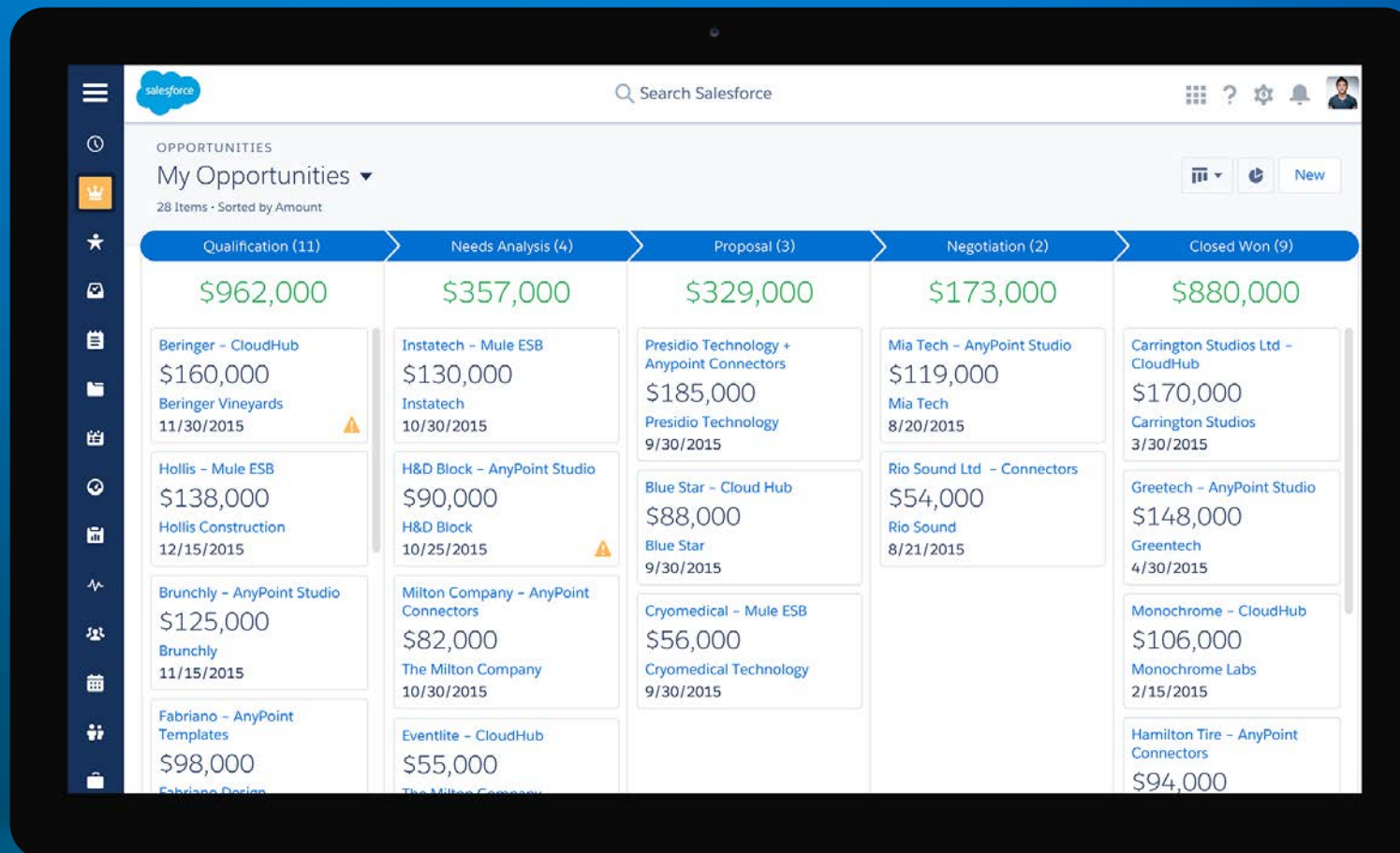
- ⊕ Customize the user interface to match the way your team works.
- ⊕ Add additional functionality by creating your own actions and apps.
- ⊕ Tailor the elements, labels, and screens to your sales funnel, not the other way around.

Ready to learn more?

Wondering how else Salesforce can put you ahead of your competitors? Download the free e-book [The Cutting Edge of Sales.](#)

Redesign Highlight: Pipeline Board

For too long, a sales professional's pipeline has existed only as a vague idea of their active accounts and it's current status. The Lightning Experience finally brings it all to life with the Pipeline Board so you can finally understand exactly how your deal is progressing and where it's heading. The board shows you how much value you have in each stage of your sales cycle, which opportunities are in each stage, and what you need to do to move them to close. Easily drag and drop opportunities across stages and customize the board to match your team's sales cycle.



Features

Easily drag and drop opportunities across stages

Stage values calculate automatically

Get alerts on accounts that need attention

Conclusion

Since it was founded in 1999, Salesforce has grown at an incredible rate with three updates each year that add features and functionality that have helped to make it the industry leader in CRM solutions.

The Lightning Experience is the product of all the functionality, tools, and innovation that has made Salesforce the #1 CRM in the world and blending it with a legacy of knowledge, experience and conversations with our customers.

With Lightning, Salesforce users can sell smarter, sell faster, and sell the way they want to sell. The result? Sales performance that blows the competition away.



RESOURCES YOU MIGHT ALSO LIKE:



Watch the Lightning Demo

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With Salesforce1

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See Sales Cloud in action

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**CONNECT TO YOUR CUSTOMERS
IN A WHOLE NEW WAY**



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