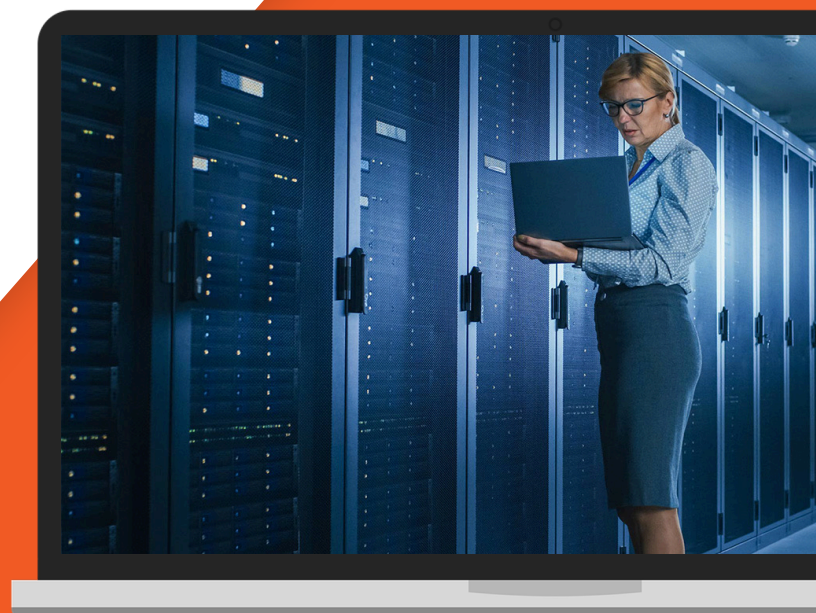# Battery Manufacturer: Salesforce Lighting Migration

CASE STUDY

The **Client**

The client is a premier wholesale distributor of lead and lithium batteries. They're committed to the core beliefs and values that shape their unique culture and foster strong relationships with their team, their customers, and the communities in which they work.

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The **Problem**

The client approached Marketing Automation Canada (MAC) looking for guidance and support to convert their Salesforce instance from Classic to the Lightning interface. Their internal team had already created automations within the system, which they were looking to keep intact following the transition. Another reason for updating to Lightning was to have the ability to install a third-party integration with SAP (System Applications and Products in Data Processing). They felt confident that teaming up with our experts at MAC would ensure a smooth transition.

They also wanted their Salesforce instance to be as close to their current Classic instance as possible when it came to functionality. With certain updates which are present in Lightning, this would require development work to alter the out-of-the-box functionality to match their current Classic environment.

They dedicated a member of their IT team to work hand-in-hand with the MAC team to ensure the deliverability of Lightning met their requirements.

The **Solution**

We broke down the requirements into three phases, each lasting a little over three months. The first phase was to ensure their security was set up as per the standard, with a Single Sign On. After setting up their security, we created a partial sandbox to begin creating the Lightning pages and Lightning apps, updating Visualforce pages, updating installed apps, and converting any necessary buttons.

Along with a rep from their team, we made changes to match their current classic environment and confirmed their daily workflows would not be significantly impacted. With the migration to Lightning, they were aware that some features may look different or simply not be available without developmental work.

After developing and customizing all of the Lightning pages and apps, we created a full testing sandbox for the first phase of testers from their organization. These users were guided by their internal IT team, who worked collaboratively with the MAC team to ensure we were meeting the requirements and making changes to support the unique needs of their organization.

We spent the third phase making changes while the first batch of test users were going into the full sandbox to test the functionality of the features they would be using on a daily basis. After these features were deemed to be working as required, we pushed the changes into production after hours to ensure their day-to-day operations would not be interrupted.

After moving to production, we enabled users for Lightning using a phased approach while their IT team provided walkthrough training to their users. Our team provided day-to-day, ongoing support as needed with minor changes and tweaks to their functionality to ensure a smooth transition.

Milestones

- Through the delivery of our work, we were able to help this client seamlessly transition from their Salesforce Classic environment to Lightning.

- Development and testing of the Lightning environment in a sandbox environment helped them to keep their workflows functioning without disrupting their day-to-day business operations.

- We moved all changes to production outside of regular business hours to ensure operations were not impacted.

- We provided the team with access to Lightning using a phased approach to help their users transition smoothly.

Marketing Automation Canada offers expert Marketo consultant services. We can assist with Marketo design by using Marketo certified experts. We also offer expert Pardot consultants, and Pardot implementations by Pardot certified consultants.

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