



## Nervous About Converting From Classic to Lightning? Learn From This Company's Success

NOVEMBER 14, 2019 | NIKKI CARTER | SALESFORCE, TECHNOLOGY

We know that change is never easy — and if your company has been using Salesforce Classic for some time, you may be nervous about switching to the new-and-improved Lightning uplift. Even if you've heard about the [myriad benefits of converting](#) (access to new functionality, increased productivity, and much more) you might still be on the fence.

At [RelationEdge](#), we specialize in helping our clients succeed with the right technology solutions, and we've helped many businesses [make the change from Classic to Lightning](#). We understand your trepidation, and it's true that this process will take planning and conscious effort to be successful — but that's exactly why we're here to help you.

On a recent project with [The Stow Company](#), we worked with their team to ensure they were fully prepared for their Lightning conversion and that there were no interruptions to the level of customer service they were able to provide. The Stow Company was extremely satisfied with their experience working with RelationEdge during and after their Lightning implementation.

Now that they're live on the platform, we asked The Stow Company to share their story with you to illustrate what you can expect when it comes time for your own conversion. Read on to learn more!

### Why Lightning, Why Now?

**Note:** You should be prepared to have Lightning activate for your org within 3 days of January 7, 2020. This is the home stretch to begin your conversion project!

The Stow Company knew the clock was ticking when it came to converting from Classic to Lightning; they'd first heard the news about Lightning from their Salesforce reps and then again at Dreamforce in 2018. By the time the team attended [Connections 2019 in Chicago](#), they couldn't help but notice the number of sessions covering transitioning from Classic to Lightning.

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the results was a pivotal moment for the team — they had no idea how to interpret what they were seeing and quickly realized they needed help from someone who could read this new language. They also acknowledged they did not have the internal bandwidth to handle the transition project by themselves.

“We knew we needed some external expertise to help us better understand how our specific configuration would be impacted and what the conversion process would be like,” Mike remembers. Through [the initial discovery process](#), RelationEdge was able to help The Stow Company fully understand what to expect throughout the transition, easing their concerns and allowing them to create a solid game plan for how to move forward.

## Preparing for the Change with End User Training

In order to prepare for the impending changes, The Stow Company began to train their end users. Mike initially introduced Lightning to his teams through instructor-led sessions several months in advance of the switch, to give users a preview of what was coming. Later, RelationEdge engineers were able to completely take over the training and workflow walkthroughs to make sure users were ready for Lightning.

The Stow Company also identified a test group of internal users who could not only walk through the transition process with their teammates but would advocate within the company to encourage user adoption.

Mike feels strongly that the most important element of a technology conversion is making sure your users are equipped with what they need to be effective when the system goes live. The Stow Company’s biggest concern was that users’ workflows would not be interrupted when Lightning went live and that customers would still receive the same responsive service they were used to. While this took some extra time and preparation on the front end, the team knew it was worth it to answer everyone’s questions and make sure all users were on the same page before launch.

## Life After Lightning

All of the time spent preparing and in training sessions paid off — ultimately, The Stow Company was able to successfully transition to Lightning with no interruption to customer service or normal business operations, and they’re very happy with the results. There were some minor speedbumps when it came to third-party integrations that needed to be adjusted, but they were handled smoothly and efficiently. Overall, the project went as expected.

Today, end users at The Stow Company enjoy a cleaner UI, as well as increased functionality with reporting and opportunity features that were not available in Classic. Switching to Lightning has established a foundation from which the company can build and explore the new, rich features within their Salesforce platform.

## Benefits of Working With an Implementation Partner

Working with an expert consulting partner means you’ll know exactly what to expect as you begin a project and throughout the phases of the work. “We’re now working with RelationEdge on a couple of other projects, and you do a really nice job of detailing all of the major elements of the project — what needs to be done, how long each task will take, who needs to be involved, and what dependencies exist,” Mike notes.

While knowing what to expect is obviously important, the benefits of working with RelationEdge on your conversion project extend far beyond that. Mike says, “We truly leaned on RelationEdge to do *everything*. The RE team helped read the Lightning readiness report, scope the project, build the transition plan, execute the plan in our sandbox environment, train our users, deploy the launch — everything. It was a tremendous help. They did all the heavy lifting on their end, and we just had to be there to help facilitate conversations and make key decisions.”

Ready to learn more about what it takes to convert from Classic to Lightning? Check out [our assessment](#) here and if you’ve got any questions, [contact us to start a conversation today](#).

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