Live Migration of 20+ million records from a legacy CRM onto Salesforce

The
CLIENT

The
BACKGROUND

The
TASK

The
CHALLENGE

Why
SUYATI

The
SOLUTION IN A LINE

The
WORKFLOW

Solution
HIGHLIGHTS

RESULTS

BENEFITS

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The **CLIENT**

A major publishing industry icon and leader in the self publishing sphere.

The **BACKGROUND**

The client had 2 CRM systems in operation. One was a customized, legacy CRM hosted at their office in Philippines. The other was the more modern, cloud based Salesforce CRM. Because of the dual systems, there was a lot of duplication work required, coupled with a tedious flow of information between the two offices.

The **TASK**

Phase out the legacy CRM. Shift the offshore office onto Salesforce. And transfer all the records from the legacy CRM onto the cloud, while maintaining 'business as usual' at both offices.

The **CHALLENGE**

- A large amount of data to be transferred – 20+ million records, including:
  - . Books
  - . Orders, order items
  - . Catalogues
  - . Author info
  - . Work flow records

- Legacy CRM was implemented 10 years ago, in ASP, using SQL Server as a backend

- Legacy data was stored in unstructured tables

- Continuous integration with existing system until it is completely phased out

- The client had multiple imprints, and books published from countries – USA, UK, NewZealand, and Australia. Each record had to be linked to the right imprint, and mapped to the correct location
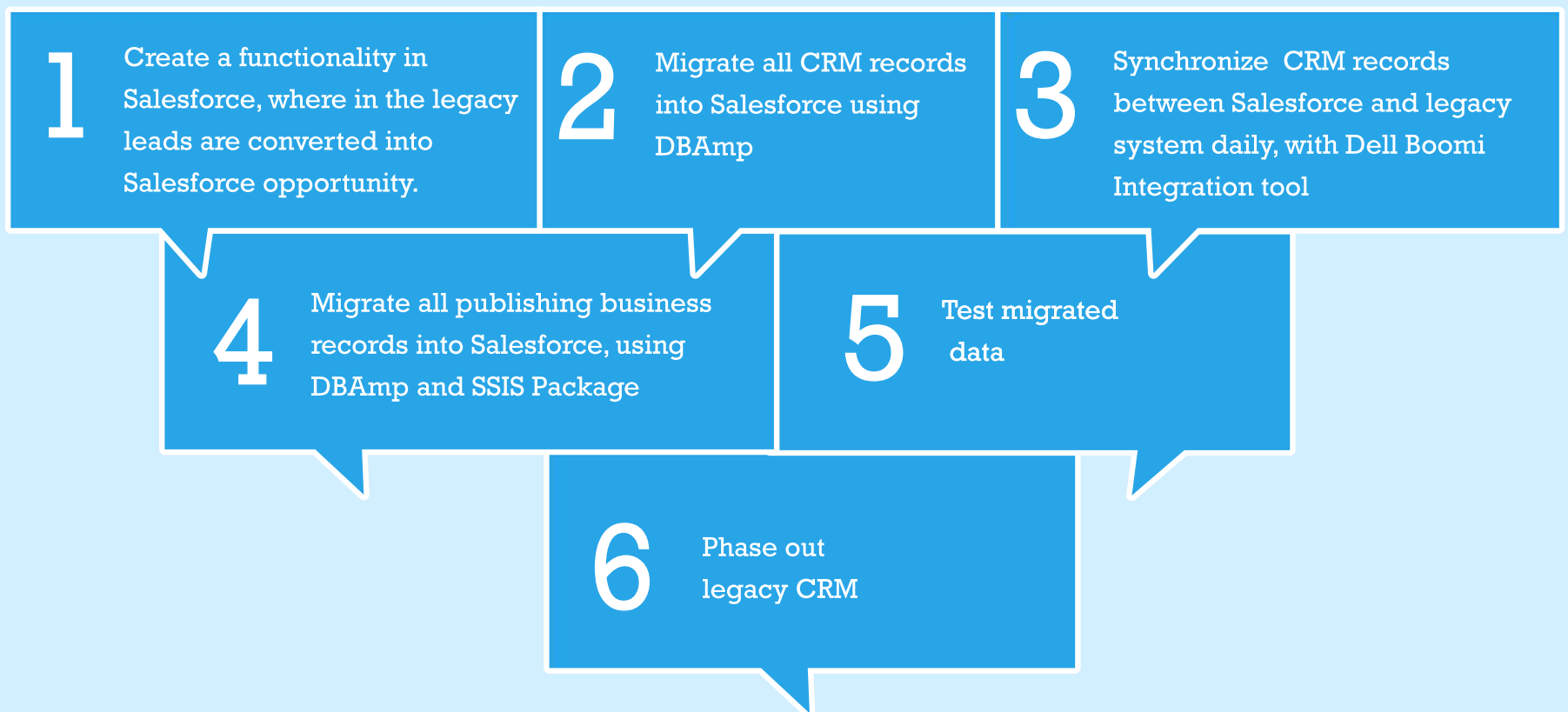
Why **SUYATI**

- A 3-year, fruitful association with the client
- The Dedicated Global Team model of outsourcing, which gives clients the remote, while Suyati handles the rest
- Extensive experience in migration from Microsoft Dynamics CRM, FileMakerPro, SAP, Excel sheets
- Database migration via ETLs like Dell Boomi, DBAmp, SQL 2012 and SSIS 2012
- 30+ Salesforce developers including DEV 401 certified developers
- 130+ modules with around 1 million LOC on Salesforce delivered successfully

The **SOLUTION IN A LINE**

Migrate data in phases - one office after the other - with the help of a monitoring package and SQL programs.

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1 Create a functionality in Salesforce, where in the legacy leads are converted into Salesforce opportunity.

2 Migrate all CRM records into Salesforce using DBAmp

3 Synchronize CRM records between Salesforce and legacy system daily, with Dell Boomi Integration tool

4 Migrate all publishing business records into Salesforce, using DBAmp and SSIS Package

5 Test migrated data

6 Phase out legacy CRM

The WORKFLOW

The workflow involved two sets of migration:

1. CRM Migration(leads, contacts, opportunity, etc), and its daily synchronization between the legacy system and Salesforce

2. Migration of Publishing business data to Salesforce, and testing it before phasing out the legacy system
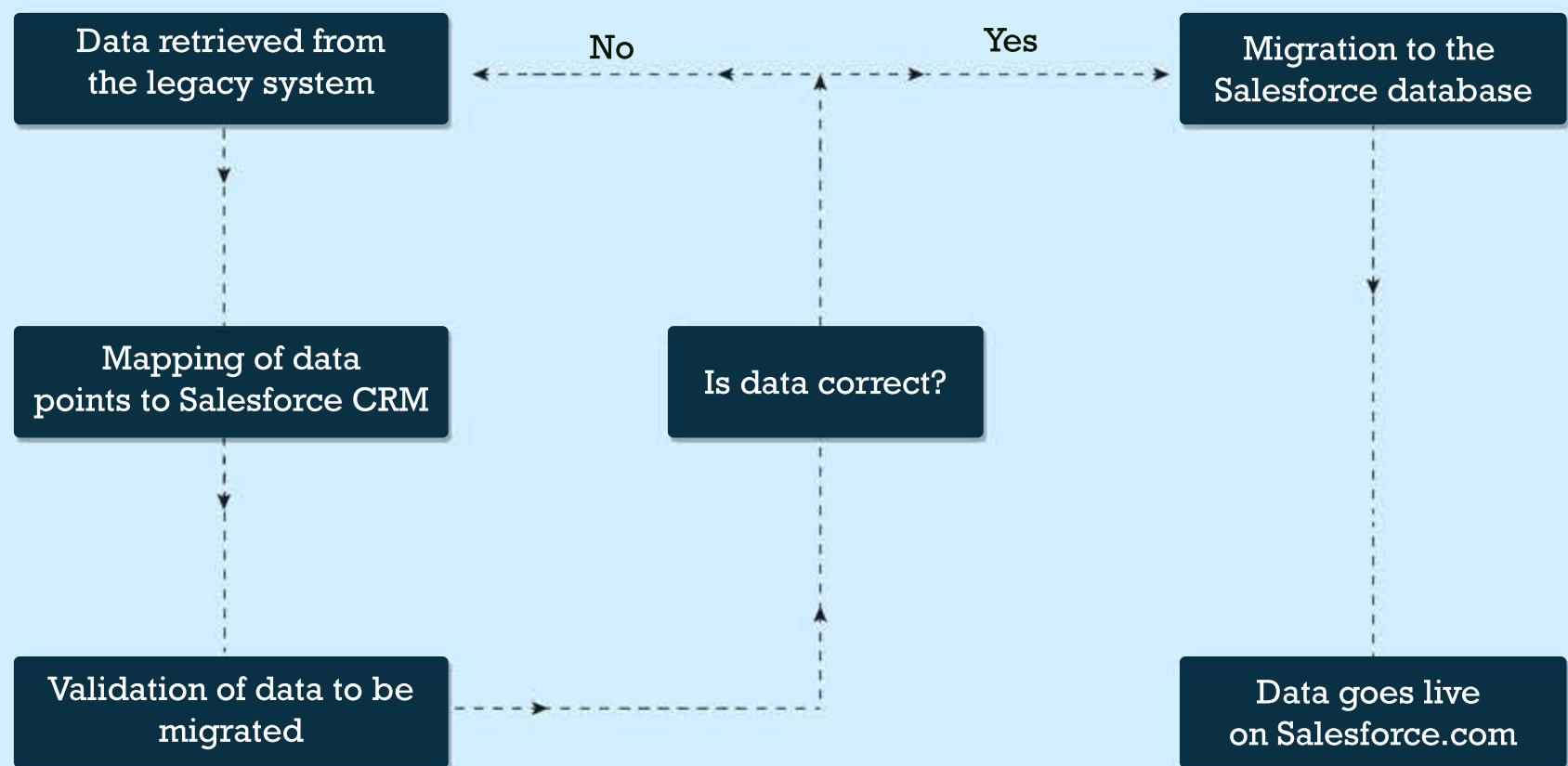
Solution HIGHLIGHTS

BYTE-PERFECT
DATA MIGRATION

The data migration was done using DBAmp. The first step was to create a data migration plan, followed by the data migration process design. Finally, the architecture including data quality strategy was devised.

Then, the data points from the legacy system were mapped to salesforce.com object level. After this, data migration templates and schema were designed and created of through field level mapping. This was done so that the same process could be repeated for the different brands, imprints and offices. Multiple test loads across all the functionalities were handled, until errors and omissions were addressed completely.

The penultimate step was verification and validation of migrated data, data followed by finally migrating data into the live Salesforce.com SFA solution.

```
┌─────────────────────┐        No            Yes        ┌─────────────────────┐
│  Data retrieved from│ ◄─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─► │  Migration to the   │
│  the legacy system  │                                  │ Salesforce database │
└─────────────────────┘                                  └─────────────────────┘
         │                                                          │
         ▼                                                          ▼
┌─────────────────────┐        ┌─────────────────────┐   ┌─────────────────────┐
│   Mapping of data   │        │  Is data correct?   │   │    Data goes live   │
│ points to Salesforce│        └─────────────────────┘   │  on Salesforce.com  │
│        CRM          │                                  └─────────────────────┘
└─────────────────────┘
         │
         ▼
┌─────────────────────┐
│ Validation of data  │ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─ ─►
│   to be migrated    │
└─────────────────────┘
```

SEAMLESS INTEGRATION
WITH EXISTING SYSTEM

Because both the legacy CRM as well as Salesforce were to be used intensively while the migration was on, it was imperative to integrate the two. Extensive mapping was required to ensure that any change to the records on one system was reflected in the other. At the same time new records created in one had to show up in the other. Buttons were added in various pages to facilitate this, and external web services were used to retrieve data from the legacy system as and when required by a user on Salesforce.

Concurrently, new leads created in Salesforce needed to be displayed in the legacy CRM. Therefore, when a new lead was created, the existence of such a record in the legacy system was checked for. If not, we created a new lead in the legacy system, and mapped it to the opportunity record.

TIRELESS
TESTING

Intensive testing was the name of the game, both before and after the data migration. The pre-migration phase was to ensure that the code was working perfectly, while also fine tuning it. After each batch of data migration, extensive UAT testing involving nearly 500 steps was conducted to ensure all the data was transferred.

METICULOUS
MONITORING

SQL programs were devised to confirm both the 'running' status, as well as the status after the run.

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RESULTS

Data migrated to Salesforce over a period of 7 months, with zero downtime, and no disruption to business as usual.

BENEFITS

1. Single application to standardize sales processes

2. Application runs on the cloud

3. Comprehensive, consistent sales information with real-time visibility into key sales metrics

4. Increased level of standardization of methodologies, processes, and tools

5. Seamless integration of Salesforce.com application, with customers' applications

Suyati is a young, upwardly mobile company that's focussed on delivering niche IT services, that support myriad Digital Engagement strategies. Our solutions include integration and partial delivery of CRM, CMS and Ecommerce services to suit your unique requirements.

When it comes to Salesforce, we are an AppExchange partner, and offer top-notch solutions in customization, development, migration, and integration. Our team of 30+ developers - including DEV 401 certified developers, who've created around 1 million LOC - deliver pioneering, out-of-the-box solutions, which often end up as industry benchmarks.

To learn more, visit: http://suyati.com/services/crm/salesforce-consulting/

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