

Seamless Migration of 23-M Data Records & Merging of Technology Landscapes Using FloData

Case Study

Insight

A leading global revenue lifecycle management company acquired a near-peer competitor from the Quote-to-Cash space to form an integrated entity. There was a need to implement a strategy to integrate digital products and services as well as unify the business processes of sales, marketing, services, partners, and customers seamlessly. During this merge, it was critical that no data was lost in the process.

Forsys in partnership with [FloData](#) enabled the client through every stage of the integration; from developing a strategic vision, establishing the end-state goals, to assessing the risks and creating the governance structure required to execute the integration successfully, consolidating the different Salesforce instances, and migrating 23 M records.

Industry
Software
Development

Revenue
\$400 Million

Employees
14K

Headquarters
Colorado, US

Business Challenge

The client was burdened by the ownership of multiple Salesforce instances. They oversaw the challenges concerning the effectiveness and cost of consolidation because of different business processes, objects, and third-party packages.

Additionally, the aggressive timeline to achieve synergies between Salesforce to Salesforce, unify the data and systems, and ensure adoption without any disruption were the key focus areas of this integration.

Listed below were the critical requirements of the client:

- ➔ Consolidation of Salesforce Marketing Cloud, Sales Cloud, Service Cloud, Customer and Partner Portals.
- ➔ Consolidation of master data associated with these business processes, i.e., accounts/contacts/profiles.
- ➔ CPQ maintenance & performance improvement of product configurations.
- ➔ Manage compliance and governance risks.
- ➔ On-boarding of multiple stakeholders.
- ➔ Secure data & solve data discrepancies.
- ➔ Fix issues in quote approval visibility, pricelist proliferation, and subscriptions.
- ➔ Readiness of master data and migration of both structured and unstructured data - files, attachments, emails, knowledge articles, comments, and feeds.

Transformation Journey

Forsys consolidated the multiple Salesforce instances of both the entities and launched it as per the timeline, using its in-house tool, [FloData](#) Salesforce Data Merger.

The key highlights of the approach to the solution are:



Identification of the current state of Salesforce.



Engage with the C-Suite to create an integration thesis.



Design, analyze, & pressure-test the resulting changes.



Automation of the flows for data migration and reconciliation.



Launch & manage the integration program E2E.

Impact

The integration was completed within 15 months. The project was delivered in 5 releases, where each release was normalized within 2 weeks.

The below-mentioned metrics define the success of the project:

- **Data management & delivery of instant insights and recommendations.**
- **Seamless access to all data in one place (single source of truth).**
- **Simplified repetitive tasks & improved collaboration between teams.**
- **Deploy custom objects to support key business processes.**
- **Improved cost efficiencies and time savings.**
- **Migrated 23 M records, 290 M data points and +100 GB data.**
- **Improved UI for Partner and Customer Communities.**

About the Client

The client is a leading Revenue Lifecycle Management company that delivers the most scalable revenue lifecycle management solution to help companies crush operational complexity. With global operations spread across North America, Europe, and Asia, the customer boasts a strong 12,000+ customers.

Technology/Tools

[FloData](#), Salesforce Data Merger, JIRA