FORSYS
Forward Thinking

Industry

IT Services
 & Consulting

Revenue

>$5 M

Employees

25+

Headquarters

Telangana,
India

E2E Migration of Salesforce Org in 3 Weeks With 100% Automation of Lead-to-Cash Process

Insight

An award-winning IT infra and solutions company wanted to migrate their Ireland-based Salesforce org to a new India-based Salesforce org to optimize cost and automate lead-to-cash processes.

Forsys used the FloData Org Merger Accelerator to help the client migrate and set up a Salesforce Org in India in less than three weeks, including data of account, products, quotes, orders, and invoices. As a result, the client's India office has now fully automated lead management tasks such as lead distribution, tracking, qualifying, alerts, and reminders, resulting in a significant improvement in time to market, 44% sales productivity boost, ~37% growth in win rate, 35% decline in sales rep ramp time, etc.

Business Challenge

The client outgrew the ability to manually manage their lead-to-cash process in India. While they chose Salesforce to manage accounts, products, quotes, orders, and invoices, they lacked the expertise to migrate the Salesforce data from Ireland and set up a new Salesforce Org in India.

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Transformation Journey

Forsys worked with the client's executive team, developed, determined, and finalized the migration plan using the Org Merger Accelerator of FloData and the Force.com ANT migration tool. We evaluated the changes and ensured that the source-to-target migration took place before the November 11, 2022 deadline for Salesforce.org, within three weeks, and with minimal disruption to business continuity.

The key features of the approach to the solution are:

- Salesforce data mapping and migration

- Packaging and migration of Salesforce metadata components

- Third-party application migration and configuration

About the Client

The client is an IT infra and solutions company, focused on the designing, execution, delivery and support of enterprise solutions for industries including high technology, industrial manufacturing, infrastructure, media & communications, and life sciences. It delivers enterprise solutions to automate and optimize complex business processes.

Solution Components

Salesforce, FloData, Force.com Migration Tool (ANT)

Impact

After the go-live, the client realized a series of benefits:

Improvement in **time to market**

Jump in sales productivity by **44%**

Increase in win rate by **~37%**

Faster onboarding of new sales reps by **35%**