

# SALESFORCE ORG MIGRATIONS

Companies in growth mode need the ability to merge, acquire, divest and transform their business in order to compete and dominate their markets. A company's speed, flexibility, nimbleness and resiliency is critical to not just maintaining business continuity but quickly and efficiently realizing gains from these strategic initiatives.

## 1 What are Salesforce Org Migrations?

A Salesforce Org is an abbreviation of *Salesforce Organization* as it pertains to a deployment of Salesforce with a defined set of licensed users. An "org" is the virtual space provided to an individual customer of Salesforce and includes all of the associated data and applications, and is separate from all other orgs.



### SALESFORCE ORG

Licensed Users  
Security Settings  
Apps  
Integrations

Metadata  
Data  
Configuration Settings  
Automation  
Devops

Code  
Layouts  
Templates  
Reports

### COMMON ORG MIGRATION TYPES

#### MERGERS AND ACQUISITIONS



- Merge into target Org
- Reset into new Org

#### SPLITS AND CARVEOUTS



- Extract from source
- Org into new Org

#### MIGRATIONS AND RESETS



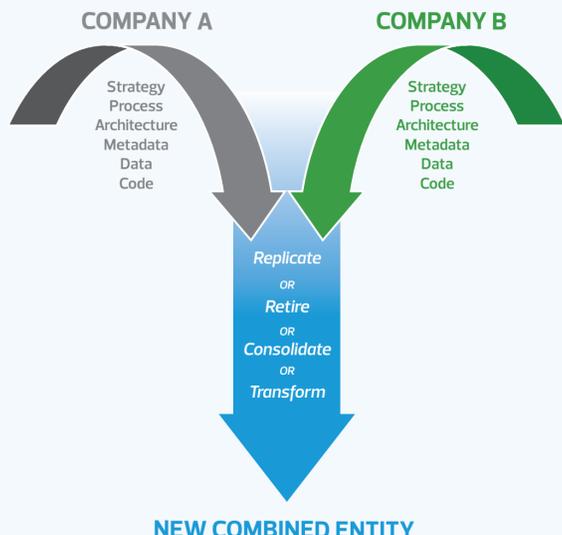
- Migrate to new Org
- Improve in current org

Salesforce Org or 3rd party System

Moving this virtual space from Salesforce org to org, or from another technology to a Salesforce org is a common need for growing companies who need to merge, acquire, divest as part of their strategy. We use the term Org Migration to describe these types of activities. For illustrative purposes we focus the following information on mergers and acquisitions but similar issues and efforts are required for divestitures and carveouts.

## 2 What are the considerations and challenges?

When migrating an org, it is critical to understand what the business objects are given the constraints. **The path to alignment between two merged companies depends heavily on strategic goals, timing, budget and skills.** Org migrations unfortunately do not have a simple "cut" and "paste" option. The movement of process, data, metadata, code, applications, integrations etc. in a live environment is complex, intricate and ripe for error.



### COMMON PITFALLS OF COMPLEX ORG MIGRATIONS

- Settling for pure replication, or "lift and shift" resulting in migrated technical debt, siloed processes and duplicate data. Consider level of "garbage in, garbage out" that is acceptable
- Not designing for traceability – Inability post-migration to access critical information such as historical ID's
- Improper security handling resulting in unauthorized access and threat exposure
- Incorrect order of data loads causing data integrity issues
- Weak go-live planning that can result in accidental "avalanches" of notifications, alerts and emails during migration
- One-way data integrity issues, such as timestamp, owner fields, etc. not being properly handled during migration
- Assignment rules, validation rules and automations can corrupt data causing weeks of data cleanup and lack of confidence in new system
- Unscalable data loading that may violate governor limits and create inefficiencies that result in days of downtime and need for multiple, complex loads

## 3 What are the approaches to solving it?

Companies in growth mode need the ability to merge, acquire, divest and transform their business in order to compete. **For an org migration, the correct approach depends highly on the desired business strategy, current state constraints, time to market and budget.**

		LIFT AND SHIFT	DATA AND METADATA CONSOLIDATION	PROCESS CONSOLIDATION	PROCESS TRANSFORMATION
		Opportunistically reconcile user and IT environment overlap but same, siloed user experience	Opportunistically reconcile data and metadata overlap but keep process largely siloed	Opportunistically reconcile data, metadata and process but incremental roadmap to desired state	Company has clear vision of combined entity that takes advantage of merger benefits
IT	User	✓	✓	✓	✓
	Security	Siloed	✓	✓	✓
	Apps / Managed Packages	Siloed	✓	✓	✓
	Integrations / Architecture	Siloed	✓	✓	✓
	Devops	Siloed	✓	✓	✓
	Technical Debt	Siloed	✓	✓	✓
DATA AND METADATA	Data (e.g. Accounts, Contacts, ...)	Duplicates	Targeted Deduping	Targeted Decluping	✓
	Metadata (Roles, Profiles, Picklists, ...)	Siloed	Targeted consolidation	Targeted consolidation	✓
	Code (Process Builders, Flows, APEX, Visualforce, ...)	Siloed	Targeted consolidation	Targeted consolidation	✓
	Reporting	Siloed	Basic, org-wide reporting	Org-wide and targeted detail reporting	✓
PROCESS	Intake channels and queues	Siloed	Siloed	Targeted consolidation	✓
	Process stages	Siloed	Siloed	Targeted consolidation	✓
	Templates and Automations	Siloed	Siloed	Siloed	✓
	Cross-sell and Upsell optimization	Siloed	Siloed	Siloed	✓

A "Lift and Shift" approach is the most basic and focuses mostly on IT consolidation advantages. However, many organizations take this unique opportunity to consider other forms of consolidation such as process, architecture, data and metadata consolidation while also taking the opportunity to remove technical debt. Others invest in a full transformation approach to take full advantage of the merged entities (for example, merging and transforming sales processes, cross-selling each other's SKU's, merging and getting a full reporting view of the entire combined business).

## 4 How to execute

Strategy and planning all come down to execution. Getting it done right the first time is critical to end user adoption and a successful rollout. **Starting with determining the correct approach is critical – balancing current state, desired future state, risk and reward.**

Cutovers from one live system to another requires intricate planning and preparation, particularly if there will be improvements made along the way to consolidate processes, data and architecture and remove technical debt.

Detailed user testing, practice data runs, bulk and delta data migration loads are best practices in order to minimize data integrity risk and downtime.

**Change management activities and hour by hour cutover planning and hypercare support will help ensure that the migration will be successful** and serve as organizational learning for the next merger, acquisition or carveout.

### 1. ASSESSMENT

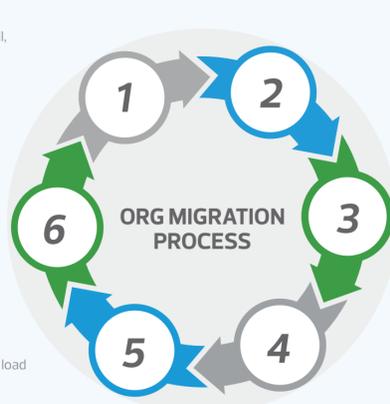
- Align on business goals given time, cost, skill, system and organizational constraints
- Assess current state process and systems
- Determine approach

### 6. RINSE AND REPEAT

- Process and system catalog as baseline for next acquisition, carveout, etc.
- Retrospective on process, deployment and cutover
- Build best practice framework

### 5. GO-LIVE

- Training and change management activity
- Hour by hour cutover planning
- Freeze current systems and final delta data load
- Test/verification and go-no-go cutover
- Hypercare support



### 2. MIGRATION PLANNING

- Define "to be" architecture
- Determine replicate, retire, consolidate or transform for all data, structure, code and architecture
- Build business process catalog to ensure process completeness and serve as input for testing
- Build detailed project plan
- Build a change management plan

### 3. METADATA BUILD AND TEST

- Configure target sandbox and system
- Sprint review and iterative development
- Create data migration mappings to field level
- User Acceptance Testing (UAT)
- Go-live practice runs

### 4. DATA MIGRATION

- Configure data extract, transformation and bulk loading
- Initial test loads in sandbox
- Bulk data loads of historical data

## 5 Next steps

Org Migrations can get extremely complex and require many business and technical decisions that have to be made in order to migrate successfully. If you have never performed an org migration and you have time and change management constraints, seek advice and get an assessment on current and future state in order to determine the right approach and to plan it accordingly.

The success of an org migration plays a key role in the success of the original transaction that spawned it and should have the proper attention in order to maximize efficiency, minimize disruption and accomplish your strategic goals.

## Ready to Get Started?

Call us at 800.274.3978 or send us a message at [salesforce@rsmus.com](mailto:salesforce@rsmus.com).

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