



# DATA MIGRATION CASE STUDY

## Client XYZ

<https://www.xyz.com/>

*“We It’s been a pleasure working with Kloudrac for past 2 years. Till date I have given them 3 of Projects and they have successfully delivered them in the defined timeline.”*

### **Executive Summary**

During the acquisition of 2 companies, the complete migration of Marketing and Sales data was done from one Salesforce Instance to the other Salesforce instance.

## Trademark Acknowledgement

Copyright © 2018 Kloudrac Inc.

All products or brand names used in this document are trademarks or registered trademarks of their respective companies. The information in this document is subject to change without notice.

Kloudrac shall not be liable for errors contained herein, or for consequential damages in connection with the furnishing, performance or use of the material. No part of this document may be reproduced or transmitted in any form or by any means, for any purpose, or translated to another language without the prior written consent of Kloudrac.

## Confidentiality Statement

By accepting this document, the recipient agrees:

- To keep permanently confidential all information which it contains.
- To treat and retain as secret and confidential all information contained in this document or otherwise acquired by the receiving party from Kloudrac including, without prejudice to the generality of the foregoing, all handbooks, manuals, drawings, designs, specifications, charts, diagrams, tapes, disks, diskettes and any other documents or materials containing such information.
- This may not be construed as legally valid and binding agreement between Kloudrac and the recipient of this document. If accepted, an agreement will be formalized by incorporating mutually agreed terms and conditions.

**Background:**

This client, based in United States acquired a company of same line of business where both the companies were using Salesforce.com to manage their complete Marketing, Sales and Quoting Process. So, it was all required to migrate the complete data of Leads, Account, Contact, Opportunity and Opportunity Line Item from one Salesforce org to another and have it all in one org.

**Challenges:**

The major challenge client faced was to migrate the high volume of unorganized and error prone data to Salesforce.com.

**Challenges faced:**

- There were many duplicates in the system based on Name and Country.
- Both the companies had many same customers, so the merging was required based on different conditions.
- Correct Ownership was required to be defined once the Lead, Accounts and Opportunities were migrated.
- Opportunity Line Items were supposed to be attached with the correct Opportunity.

**Solution:**

The project included defining the data and process migration roadmap, cleansing guidelines, attribute mapping, migrate all the Marketing, Sales and Quoting data along with the other data modifications required.

**No of Employees:**

2000+

**Platform(s)**

- Salesforce.com

**Tools and Technologies**

- Salesforce.com
- Data Loader
- Data Duplication and Cleansing in XLS

**Category**

- Enterprise

**Country/Region**

- United States

**Features**

- All the clean data of Lead, Account, Contact and Opportunity was migrated to one Salesforce Instance.
- No Duplicate data exists in the system.
- Same Accounts were merged together, and one consolidated record was created.
- External Id was maintained for all the records migrated.

## 1. Our Development Methodology (Agile)

The development methodology ensures all aspects of the program are managed leveraging specialized tools, technologies and implementation enablers. Kloudrac work closely with client to ensure the key business drivers and requirements are addressed during the program.

- **Strategy** - To defines the overall business direction and objectives of the program
- **Architecture** - Proposed architecture to be robust to meet all quality attributes of an application
- **Requirements** - Business, reporting, communication and other
- **People** - People to provide the support and information as required in the program
- **Processes** - Business processes that need to be implemented in the system
- **Initiatives** - Initiative and support for the change.
- **Programs** - Programs are defined and signed-off.

## 2. Why Agile?

This approach is used to bring the uniformity of program execution across all the SDLC phases in Project Perfection. Since SDLC phase initiatives are very diverse in nature it will pose challenge in managing and governing these with distinct approaches, with no uniformity on tracking the milestones. The Agile approach will ensure following:

- **Uniform Project Execution** - Ensure that the overall program plan has consistent tracking mechanism for each track by avoiding the ambiguity that will arise due to different interpretation of status coming from different track.
- **Uniform Milestones** - It is planned that milestones will be made uniform across all tracks in order to achieve intermediate states and final states with business objective in mind. For example, after the elaboration phase, project must achieve the increased visibility into processes, people, IT assets, information availability and needs, stakeholders, impacted items in form for current state so that projects do not lose the information. Commonality in reference to project approach: While crafting proposal, it was observed that multiple approaches for multiple tracks will also impact the project execution as these refer to different terminology, follow a different phased model, milestones and often the deliverables. Iterative development approach within Agile will help contain this challenge by enforcing usage of single reference to all approaches for execution.
- **Reduce Project Risks** - In an unforeseen situation, where a project is halted in the middle, it must be able to start from the end of the previous phase and not from the beginning. This will help reduce the risk of rework, loss of information and investments made.

- **Better Governance** - The uniformity and standardization achieved in this approach will help achieve better transparency and control over the progress of the program, helping governance team get the single and simplified view of the status.

### 3. About Kloudrac Inc.

Kloudrac Inc. is a leading software product development, engineering and IT consulting company. With the decade long experience, the company helps its clients to transform in order to improve their performance and competitive positioning. Company focuses on developing latest technology solutions aimed at client's unique business requirements and challenges in critical performance areas. The company is bequeathing services including Digital Transformation, Business Intelligence and Salesforce to assorted industries across the globe.

We serve large and growing enterprise customers from diverse industries such as BFSI, e-commerce, FMCG, retail, government, healthcare, transportation & logistics, media & entertainment, travel and telecom with our flexible blend of onsite, offsite and offshore engagement models from our global delivery centers.

Kloudrac facilitates its client with best-in-class consulting services, assisting them with technology, extendibility and feasibility.

Founded in year 2013 by four technocrats; the company is headquartered in San Francisco (US) and office located in Noida (Delhi-NCR). With numerous awards and recognitions and more than 2K enterprise customers, Company Name employs 50+ highly talented and dedicated experts to deliver highest standards of customer satisfaction.

### 4. Results, Return on Investment and Future Plans

Client was surprised to see that Kloudrac was able to deliver a solution in a limited budget and time that works & made their process easy. A few other companies tried to make the same project for the client but failed to do so.

Client now has given us the project for more enhancements required to do in there system.