



# Salesforce CRM Org Consolidation Framework



## Introduction

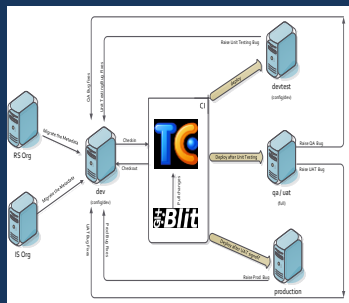
Change is an inevitable part of any business organization. Businesses Merge, they acquire new companies, departments in an Organization are combined into one unit. Any changes have a huge impact customer related data and how it is used.

For Salesforce CRM customers, organizational changes might necessitate the consolidation of multiple Salesforce CRM organizations, called 'SFDC Org Consolidation', So that businesses have a single view of Customers data irrespective of Companies change and grow.

Org Consolidation Projects involve both perils and benefits. If SFDC Org Consolidation done correctly companies enjoys benefits such as single source of reliable customer information, Standardized processes, Cost Savings and Effective reporting. If not done correctly this can result into low quality Customer data resulting into low user and Customer satisfaction ultimately leading into poor process execution from sales and marketing to finance. This paper will describe why and when need to consolidate Salesforce Org and best practices to attain best results.

## Framework for Org Consolidation

When two Salesforce.com Customers merge Operations or two business units decide to join within a same company using separate SFDC Instance it create a environment where there are two sets of data. Typically, each set of data set has been tailored to the particular need of business and its users as a result each data set has a different data structure and its own complexity.



The new organization will likely need to bring information from one Salesforce CRM instance into another so that there is one consistent source of customer data available to all users. When performing an org Consolidation, managers initially need to conduct a thorough analysis to determine what they want the new, merged Salesforce CRM system to include and which processes the application will support. The processes under consideration are then classified into:

### Single Vs. Multiple Org Consolidation

*Should you consolidate Salesforce CRM or continue operating with multiple Orgs? This is a key puzzle for organizations in this situation. Here is a quick guide to determine your direction.*

#### **When Multi-Org Makes Sense**

- ❖ Unique competitive or market circumstances that require separate instances
- ❖ Regulatory compliance, security, storage, system integration or channel conflict issues
- ❖ No business need for data rollup

#### **When Single Org Makes Sense**

- ❖ An organization is looking to have 360-degree view of customer data: sales, forecasting, executive reporting cost savings, and customer life cycle management.
- ❖ The organization wants or needs to standardize on one Salesforce CRM instance.

1. Migration pertaining to processes that have no or minimal changes.
2. Migration pertaining to processes that are being re-engineered.

3. Migration pertaining to processes that are standardized

What new security/access considerations are needed?

Are there multi-currency and multi-language issues?

### The Key Factors Considered during an Org Consolidation are:

Which organization will be the master organization?

Which fields or data sets must be included, which ones would be nice to have, and which ones can be dropped?

What resources are available to support the implementation effort?

What governance model is in place?

What's the implementation time line?

What kind of consolidation will be done among business processes?

How will different departments in the organization access and interact with the data on an ongoing basis?

How will the data be used to make business decisions?

### Steps to Org Consolidation



Setup Org Consolidation Process



Map Technology to the Process Setup



Determining how the data will be accessed, viewed & Changed?



Merge the configuration into one instance before any data loading

Sandbox environment is best because both systems will still be in use on an everyday basis.

Once the organization has done the upfront planning work, it can begin the actual merging of data, moving data from point A to point B. Oftentimes when companies do an org Consolidation, they decide to make numerous fixes and tweaks in the data and Fields where needed.

These fixes are important and essential to ensuring the best data quality. But the best practice is to merge the data into one system first and then perform cleansing. The important point is that data should be in one system before cleansing. Org Consolidation often results in some data overlap, particularly with customer account information. Companies should use technology such as data deduplication during the data cleansing process to help ensure data quality.

## Single Org Benefits

- Single Source of reliable customer data.
- One Place for 360 view of all sales, Marketing and customer data.
- Process Standardization with regards to how customer data is handled.
- Users throughout the organization understand how information in Salesforce CRM can be used and shared.
- Cost Savings as combining multiple Salesforce CRM instances, companies can reduce service/support fees. Businesses can also save IT resources because they'll no longer need internal support of multiple Salesforce CRM systems

Org Consolidation is particularly good idea if a corporate acquisition occurs or Business units consolidate and the acquired company has a Salesforce CRM instance, the acquiring company will want to examine whether it makes sense to combine the acquired Salesforce CRM instance with one of its existing instances. Org Consolidations works well when the acquiring organization will have the same management as the target organization, and when visibility across all divisions is desired. They also make sense when the customer base and sales processes of the organizations are similar, and when customer support and service requires 360-degree visibility into all products and customer lifecycle management.



### Customer Highlight

*Johns Manville, a Berkshire Hathaway company, manufactures residential and commercial insulation, commercial roofing, mechanical insulation and materials for other manufacturers' products and applications.*

### Challenges

- ❖ Two Separate Business units (IS & RS) with similar business processes using different SFDC Instance.
- ❖ Need for data rollup

### Strategy

- ❖ Data migration
- ❖ Merged the two Salesforce instances
- ❖ Enhanced roles & profiles
- ❖ Drafted Success Criteria.

### Results

- ❖ Greater visibility across divisions
- ❖ Consolidated processes & licensing fees

## Org Consolidation Success

Companies are successfully completing org Consolidation, and seeing direct benefits, with expert help from firms such as Zensar Technologies.

When Johns Manville decided to join together two separately managed business units having two separate SFDC instance into one the goal of the phase one of the merge was to move users and data of both instances into third new Org with minimal disruptions into both old Orgs.

By conducting an org Consolidation, they eliminated the need for duplicate Salesforce CRM systems and made it easier for users across different departments and teams to enter and view universal customer and market data. This has helped their customer service and cross-selling efforts.

Zensar Technologies has learned, as a result of numerous projects and deep experience serving Salesforce CRM customers, that key success criteria for an org Consolidation include planning ahead and determining clear goals for the project, involving end users in the process, identifying security and access issues up front, and figuring out exactly what information users need to access.

Org Consolidation can enable organizations to get the most effective use out of their Salesforce CRM implementations, cut costs and add efficiencies. But it's critical that companies follow best practices and get expert help when implementing such a project. A poorly conducted org Consolidation can jeopardize a company's ability to provide useful customer data to users and provide top-notch service to customers. They also risk disrupting current users if they do not understand how to complete this effort while both systems are being used daily. Firms such as Zensar Technologies, a leading software-as-a-service and cloud computing can help make the org merge process go smoothly.



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