Sugar CRM to Salesforce Migration and Integration with SharpSpring

iLab

iLab specializes in software quality assurance services, providing global solutions to their customers.

Challenge

iLab needed to migrate from SugarCRM (legacy system) to Salesforce. The migration required significant effort in data cleansing and standardization.

They also needed to integrate SharpSpring (marketing automation tool) with Salesforce.

Leads created in SharpSpring were not shown in salesforce unless they were manually entered. They were also unable to use Salesforce leads for campaigns in SharpSpring.

Solution

WilcoSource migrated all the data from SugarCRM and uploaded it into Salesforce using data loader. Data structure is now defined to capture accounts, contacts and their opportunities. Data cleansing rules were designed to ensure the system has data in the right format. Duplicate records were merged / deleted.

Out of the box lead management, opportunity management, workflows and approval process features were all delivered to meet business needs. Web to Lead was used to capture leads directly from their website. Roles, profiles and sharing rules were created to ensure the right people have access to relevant data. Chatter was introduced to the sales team for better communication on deals.

SharpSpring was integrated with Salesforce using a bidirectional sync allowing lead and contact information to flow between the applications. Customized reports and dashboards were created for improved management of their pipeline, funnel and regional forecasts.

A support management system was created using custom objects to allow Wilco Source to address any additional support requests after the implementation.

Results

Sales Cloud was successfully implemented and the client was able to move to Salesforce in a short timeline. Their marketing automation tool (SharpSpring) was also integrated with Sales Cloud enabling them to better manage their leads, opportunities and campaigns. The implementation connected their sales and marketing processes which aligned the sales and marketing teams enabling them to close deals faster.