



Moving **18,000** users to Salesforce almost 2 months ahead of schedule with conemis

Deloitte migrated over 138 countries from 4 legacy applications to Salesforce in the client's project with conemis transition cloud.

As a part of a technical transformation of their global CRM platform towards Salesforce Sales and Service Cloud, the aim of our customer was a transition from four different Oracle CRM on Demand (CRMOD) instances plus one custom-built database to one unified Salesforce instance. In the end, supported by Deloitte as a consulting partner and by conemis transition cloud (ctc), the project was accomplished in seven individual deployments for 29 sales regions with over 138 countries and more than 18,000 users.

The customer in this project is a leading supplier of systems for power generation and transmission as well as medical diagnosis, and one of the world's largest producers of energy-efficient, resource-saving technologies. It is regarded as a global powerhouse focused on the areas of electrification, automation and digitalization. The customer's aim in this project was to harmonize different processes with Salesforce and, in this context, to introduce several innovations. Naturally, the data models and interfaces between CRMOD and Salesforce were quite different.

Major risks had to be mitigated to deliver such a complex project. Among the biggest challenges was the need of extensive data conversion for multiple business units including a banking subsidiary.

In order to achieve a harmonized and simplified solution, several objects for migration required very complex transformation rules and procedures. In this context, data from five independent data sources had to be consolidated. They included financial-market regulated confidential data with the need of an individual mapping. Beyond the foundation of field mappings, 226 fully automated complex transformations had been defined for the opportunity object, including converted and consolidated values, splitting information off to related objects, etc.

Reduced original timeline by 30% and still finished almost 2 months early

Besides, the project had a definite timeline, given the decommissioning of the legacy systems. A large, distributed team has worked on the project delivery and supported the global deployments in several markets, despite the challenge of dealing with the implications of the Covid-19 pandemic that broke out in the course of the project. A joint project team with members from the customer's side, Deloitte as the consulting partner and system integrator, and conemis transition engineers have worked together by leveraging the conemis transition cloud. In the end, their joint forces made this project an outstanding success in terms of scope, quality, and budget. A particular highlight was the success in timing:

conemis transition cloud had already been part of the initial project planning, and helped to reduce the timeline originally planned, as well as the necessary efforts, by 30%. With good overall project progress and improved efficiency, conemis has contributed to pulling in the project end by another 1.5 months across all seven deployments.

Fully automated process for mastering complexity and regulation of financial services data

conemis transition cloud (ctc) has contributed to the success of this project by enabling the migration project team, as well as the stakeholders involved, to stay on top of this challenging migration, including the complex conversion processes necessary, at any given time of the ongoing project. As knowledge-driven automation for digitalizing transitions, conemis has automated and managed the migration of the users and their data to the new platform. The total volume of 30M source data records were converted into a multiple of this number on the target side. Also, there was 1 TB of attachments to be migrated included sensitive data from the Bafin-regulated (Federal Financial Supervisory Authority) financial services division. Everything was migrated in a GDPR-compliant form.



A project of such dimensions requires a rigid steering and tracking of progress and timeline, as migration efforts are usually defined very ambitiously in terms of effort from the business side. This could compromise the quality of the data migrated, due to the rate of human error surging with the complexity and time-pressure of such a project. Besides, data could get lost altogether in the process, which is particularly harmful for high-volume opportunities. Visibility restrictions on data can fail inasmuch that personal data of customers, financial records of individuals, or corporations or opportunity details, would become visible to non-authorized users. As a result, the project itself could fail to meet its timeline, which could cause extra license fees on the sources and cost for the extended time for the whole project. Altogether, there is the risk of spending the complete project budget in vain plus causing extra damage in failed and delayed innovation that the enterprise may never be able to catch up on.

The process of migrating, converting, and consolidating data from four CRMOD instances and one database to a single unified Salesforce org has been fully automated by ctc. Thus, each go-live worked without any manual processing (extracting, transforming and loading), and no juggling of handmade consolidated files was necessary. During the whole process, systematic testing ensured correct results. Thanks to this automation, it was possible to eliminate the factor of human error from roll-outs at any stage of the project.





Clean data, go-lives in time, and prevention of unauthorized use of data

The conemis consulting team has operated conemis transition cloud for both the client and for Deloitte and took full responsibility for data migration. In this process, data conversion rules have been kept in the secure central conemis repository for one single source of truth. The team has collaborated on the conemis software with full traceability of every step from every member and a real-time dashboard for live progress overview, effective communication, and immediate decision support.

Due to their sensitive nature, data between the financial services division and other departments were kept strictly isolated and separate within the conemis software. Its secure infrastructure and processes include dedicated deletion protocols after completion and ensured that data has been safely and comprehensively deleted.

In the end, not only all data in scope has been safely migrated. Moreover, visibility and access rights were met as planned, such that each division and each user could only see the data they are authorized to see. The 30 million source records have been transformed, split, and merged as

About the client

The client is a global powerhouse, focusing on the areas of electrification, automation and digitalization. As one of the world's largest producers of energy-efficient, resource-saving technologies, the client is a leading supplier of systems for power generation and transmission as well as medical diagnosis. In 2019, the client generated revenue of €86.8 billion and had around 385,000 employees worldwide.