

# Salesforce ORG Migration Services FOR MERGERS, ACQUISITIONS, SPLITS, CARVEOUTS AND MIGRATIONS



## Managing Salesforce Orgs for Competitive Advantage

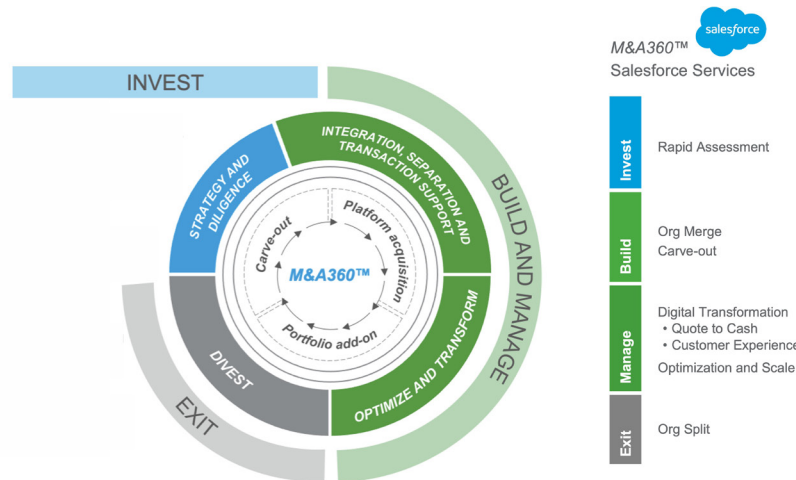
The Salesforce platform can be a true business enabler, playing a pivotal role in driving businesses forward. Middle market companies in growth mode need the ability to merge, acquire, divest and transform their business in order to compete and dominate their markets. A company's speed, flexibility, nimbleness and resiliency is critical to not just maintaining business continuity but quickly and efficiently realizing gains from these strategic initiatives.

## RSM is a Unique Player In this Market

RSM is the leader in M&A advisory services with a full range of services for both buy and sell sides. RSM offers industry leading strategic consulting, operational change management, process transformation and digital transformation services with the aim to increase transactional value.

The RSM M&A360™ framework creates sustaining and transformative value through each stage of the transaction life cycle from comprehensive due diligence to exit planning and positioning to post-merger people, process and technology integration and ongoing support.

Being able to see the "big picture" -- the interdependencies among strategy, business process, systems, architecture and data -- can make the difference between a successful transaction event or a failed one.



## RSM Org Migration 360 Services for Salesforce

RSM is a leading provider of Salesforce org migration services with a full range of offerings to handle the most complex org merges, splits, and migrations. Migrating Salesforce org's is often a highly complex and intricate process that requires careful planning and execution in order to get it done right the first time. There is no easy "export" and "import" facility. Org merges, splits and migrations can result in extensive downtime or worse, data corruption if not planned and executed correctly. Even minor integrity and process issues can cause your users to distrust your system and affect adoption.

Leveraging the **RSM Org Migration 360** framework enables your organization to take advantage of RSM's best practices, skills and experience for a smooth and successful transition.

## Org Migration Approaches – Don't just Lift and Shift

There are many approaches to performing a successful org migration. The best approach depends highly on the desired business strategy, current state constraints, time to market and budget. A "Lift and Shift" approach is the most basic and focuses mostly on IT consolidation advantages. However, many organizations should 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.

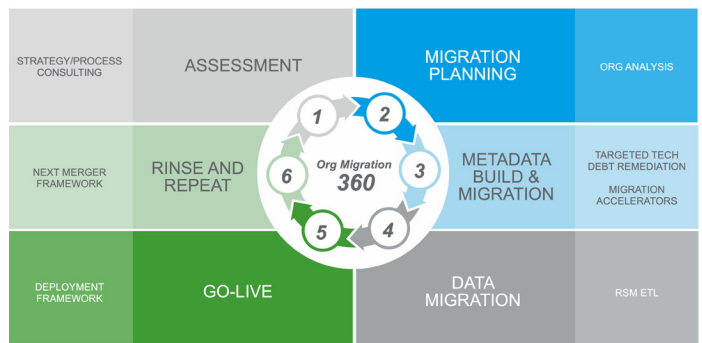
For those companies that want to take full advantage of the merged entities (for example, merging and transforming sales processes, cross-selling each other's SKU's, merging and consolidating reporting), RSM has deep experience aligning strategy with operations with technology. For other companies, the business goal may be to create an initial foundation for future, incremental integration over time.

## Org Migration 360 Framework

We conduct a best practice process that involves a high degree of analysis, methodical planning and hour by hour execution. First we assess your environment and data and determine the recommended approach. From there, we conduct an extensive analysis on the data and most importantly on the metadata, integration and application architecture. Metadata includes all object structures, users, roles, code, layouts, etc. We work with you to strategize what to migrate, retire, merge or optimize. As part of the migration planning, we highlight potential risk areas and as well, perform all mappings and needed transformations.

As part of any good migration, we perform numerous test runs in order to harden the process, and uncover potential risks in advance of launch. On Go-Live, we work with you on an hour-by-hour basis, freezing the environment, performing initial bulk loads of historical data, and managing the delta loads in order to minimize downtime. We provide ongoing support particularly on that crucial first day, first week and first month of migration in order to address any issues.

	LIFT AND SHIFT	DATA AND METADATA MERGE	PROCESS MERGE	PROCESS TRANSFORMATION
<b>IT CONSOLIDATION</b>				
User				
Security				
Apps/Managed Packages	SILOED	✓	✓	✓
Integration/Architecture				
Devsops				
<b>DATA CONSOLIDATION</b>				
Accounts				
Contacts				
Leads				
Opportunities	SILOED	TARGETED DEDUPING	✓	✓
Standard Objects				
Custom Objects				
Reports				
Dashboards				
<b>METADATA CONSOLIDATION</b>				
Layouts				
Roles				
Profiles				
Picklists	SILOED	TARGETED CONSOLIDATION	✓	✓
APEX				
Visualforce				
Process Builders				
Flows				
<b>PROCESS CONSOLIDATION</b>				
Intake channels				
Templates				
Assignment Rules	SILOED	SILO'D	TARGETED CONSOLIDATION	✓
Workflow rules				
Automations				
Product / Playbooks				



All artifacts created and the experience gained by going through these best practices provides the framework for handling subsequent mergers and acquisitions and carveouts, putting you in a better strategic position to conduct future business transactions.

## Ready to Get Started?

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

### About RSM

RSM's Salesforce offerings are rapidly expanding and, today, our team of certified professionals deliver Salesforce to our clients end-to-end from software license resales; to implementation and advisory services; to platform sustainment and support services as a managed services provider. Whether you are looking for a new Salesforce application, want to modify your existing Salesforce platform or need support for your capabilities, **RSM is here to help.**



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