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Salesforce Data Integrity Project for large Multinational Non-profit Organization

Case Study
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www.plumlogix.com

Client Challenge

- Salesforce instance of ~1000 users with multiple communities where customer and partner users register and access. Records are updated in individual communities in isolation without comprehensive validation

- The most recent analysis revealed over 25,000 contact records as duplicates. Many records associated to the same account had more than 2 copies of varying field values

- The Salesforce Communities and CRM are the primary source of duplicates

- Duplicates needed to be eliminated, as well as, disallowing the creation of new duplicates, triplicates, etc.

- No support was available from the original consultant that configured the instance

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Strategies

- Deep Dive of org to fully discover underlying architecture and system design

- Limit access of customer and partner users to singular portal for login and registration

- Development of feature upgrades in consistent with existing entity relationship model

- Development of platform features in alignment with business objectives

- Salesforce team of client and Plumlogix comprising of Project Manager, Solution Architects, Business analysts, Developers, Quality Analysts working together through different phases of the project

- Expected outcome was maximum prevention of duplicate records to total elimination

- Introduction of Smart auto-merge for existing duplicate records

- Creation of technical documentation (requirement details, design details & test scripts) during project execution for product sustainability

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Project Phases

There were four phases of the project

- Discovery & Requirements Detail Phase of the project
- Design & Implementation Phase
- Quality Assurance (QA) & User Acceptance Testing (UAT) Phase
- Production Deployment & Post Production Support Phase

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Plumlogix Challenges Encountered

- Existing Platform architecture constraints and client business requirement changes during implementation of the project due to cause and effect during development

- Unplanned system level refactoring required for effective elimination of duplicates

- Selection of best design path during project execution required additional effort

- Existing platform technology was surgically designed and developed to keep the business goals aligned with enhanced platform capabilities

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Outcomes

- Team embraced and rehashed additional tasks to meet business goals within the timeline

- Useful technical documentation like BRD, CBP, System Design Doc and Test scripts were created during project execution

- Excellent support & engagement by client & Plumlogix

- Plumlogix personnel were on-site to synergize and expedite project execution

- 100% mitigation of duplicates and proactive merging of remaining duplicate records within agreed upon SLAs

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Summary

The relationship between the client and Plumlogix team members was built on trust and reliability and continues to strengthen with more projects confirmed in the future. Documentation of BRD, System design and test scripts were compiled increasing the sustainability. With no support from the original developer, the team successfully developed and deployed the upgraded features for the reduction of duplicates. The final solution was a success in production with 100% mitigation.

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THANK YOU

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