



The trusted Salesforce developer and consultant for businesses who want to **get it right.**

# 48-Hour Challenge

How to Migrate 1,000,000 Emails from Copper to Salesforce in a Weekend





# brrr°

Cooling fabric technology startup brrr° had an increasingly frustrating problem on its hands: it had outgrown its old customer relationship management platform, Copper.

Copper, which many small businesses use because it works with Google's G Suite email and cloud file storage platform, met brrr°'s needs in the company's early days when CRM was the primary use case.

But now the fast-growing Atlanta startup needed a more robust CRM platform that would allow it to scale and also develop new functionality for tracking customer orders, sample shipments and other product tracking features that could integrate with its billing and invoicing system.

Jeff Clark, who was Chief Operating Officer of brrr° at the time, had already determined that Salesforce Sales Cloud was the best fit for their needs.

However, there was one major hurdle to making the switch: seven years worth of customer emails, customer data and other financial information lived in the Copper platform.

brrr° had reached out to other vendors, and they were discouraged to hear that it would be too complicated or too expensive to save the bodies of their archived emails.

brrr° couldn't risk losing the valuable customer data and details of more than 1 million emails its employees had sent since the company's inception.

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Could Inovi help brrr° **save more than 1 million emails?**





**THE  
CHALLENGE:  
RESCUE  
7 YEARS  
WORTH  
OF EMAILS**



A mutual colleague of Clark's recommended Inovi Solutions to help brrr° plan and execute its migration to Salesforce – including preserving the bodies of emails.

Inovi's team began with a discovery session to understand the current situation, the size and scope of the data in Copper, and how brrr° wanted to configure Salesforce to support the growth of its business.

It was quickly apparent that Copper's API allows data to be exported from standard and custom objects and fields such as Sender, Date, Subject and Recipient, but the body of the email isn't available.

The body of emails was a crucial field that brrr°'s sales team needed to preserve and migrate to Salesforce in order to keep continuity and visibility on key customer accounts, as well as prospective customers, mill partners and other vendors.

Failure to accomplish this would force the sales team to have to open up a browser and manually search for old emails in Gmail, which would create enormous inefficiencies and bottlenecks in lead qualification and the entire sales cycle.

Inovi's Data Migration team studied the situation, and created a custom solution to migrate several years of brrr° emails using Copper's API, the Salesforce Bulk API and a third party Gmail extraction tool that could import the body of the emails as a custom object in Salesforce that associated the body record with Sender, Date, Subject and Recipient.

**We created a batch job in Salesforce that matched the Copper email in Activities with the email records in the custom object from Salesforce.**





The data migration of more than 1 million records for 20 users was completed over a weekend to eliminate any possible disruptions to the work week, and took about 48 hours from start to finish.

brrr<sup>o</sup>'s conversion to Salesforce was a tremendous success. The company was able to go live with their new Sales Cloud implementation on time and under budget.

For Clark, the project ended up being smoother than he initially expected when he talked with other vendors who said it would be cost prohibitive and difficult to save the bodies of emails in Copper.

Their new Salesforce org has empowered brrr<sup>o</sup>'s sales team to be more responsive to customer needs.

They can better tailor their interactions and products they promote, thanks to the rich detail and insight from having years worth of emails and other customer interactions right at their fingertips.

*"Your commitment to our success sets a new standard for our definition of a partner. Your candor and transparency during the conversion provided a great sense of comfort. There was a true sense of dedication toward achieving the desired solution and fulfilling our expectations. We are completely satisfied with the results."*

*—Jeff Clark, former Chief Operating Officer of brrr<sup>o</sup>*