# CASE STUDY
*Migrating Healthcare CRM Systems to Salesforce*

**FPT**

A Health Information Technology giant sought to migrate data from their current on-premise systems to a new Salesforce platform. To do that, FPT Software helped in developing a comprehensive migration strategy to ensure a successful implementation and prevent data contamination.

## | THE CLIENT

Headquartered in the US, the client operates in the Health Information Technology sector, specifically information and data management. The company's revenue is over **10 billion USD** and is one of the major players in the industry.

## | BUSINESS CONTEXT

The client was providing several on-premise customized CRM systems for pharmaceutical clients. However, as they plan to migrate to Salesforce for future expansion on customer relationship management (CRM), the legacy systems need to quickly be transferred to the new platform. To facilitate this, the client sought the expertise of FPT Software to develop a strategy and detailed plan for the migration process.

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## Project's scope

### Old CRM system

**CRM System A**

**CRM System B**

**CRM System C**

**CRM System D**

**CRM System E**

### New Platform

**Salesforce-based**

### STANDARDIZATIONS OF THE MIGRATION PROCESS

Functional Migration Policy and Methods

Data Migration Policy and Methods

Common items (user permission, data access, data summary) Migration Policy and Methods

## | FPT SOFTWARE'S SOLUTIONS

FPT Software drew up a concrete implementation strategy with a detailed timeline to ensure a successful migration.

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| **Project's Scope** | Current Status Analysis, To-Be Examination, Prototype Verification |
| **Project's Duration** | 4 months |
| **Project's Achievements** | Developed a comprehensive proof of concept (POC) for the migration to the Salesforce-based platform after thoroughly analyzing the client's current CRM systems. |
| | Composed a detailed migration plan including substantial phases, expenses, schedule, and timeline. |

## | VALUES

FPT Software has successfully standardized the migration process for the client with a concrete implementation roadmap, allowing the client to:

- **Delivered a successful POC** that won the client's approval

- **Migrate their on – premise systems to the new Salesforce platform**

- **Prevent data contamination** during the system migration by thoroughly analyze the current data architecture

- **Strategize a full migration roadmap** with comprehensive schedule and budget

## | DISCLAIMER

FPT Software is a global technology and IT services provider headquartered in Vietnam, with more than USD 600 million in revenue and 22,000 employees in 26 countries. As a pioneer in digital transformation, the company delivers world-class services in Smart factory, Digital platforms, RPA, AI, IoT, Cloud, AR/VR, BPO, and more. It has served 1000+ customers worldwide, a hundred of which are Fortune Global 500 companies in the industries of Automotive, Banking and Finance, Logistics & Transportation, Utilities, and more.

For more information, please visit:
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