Astralis and Datto Migrate 6,000 Data Fields to Drive Salesforce Success

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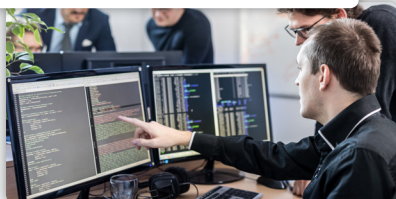
As the world's leading provider of IT solutions delivered by Managed Service Providers (MSPs), Datto Inc. believes there is no limit to what small and medium businesses can achieve with the right technology. In the same vein, Datto itself has long embraced technology and advanced CRM systems in efforts to manage its own sales efforts, utilizing several different data storage systems to drive customer satisfaction and interest from prospects.

Following the decision to merge Datto and Autotask to unify these market-leading MSPs – the company realized they needed to address new operational challenges around their CRM systems. It was time to consolidate, through a large-scale data migration to Salesforce with the help of Astralis' expert team.

Fiefdoms of Data

Datto had entered a growth period, with years of consecutive acquisitions and mergers. This allowed the company to strengthen their product offerings but presented new challenges as companies and cultures merged.

How the company collected data and executed on new leads became the most pressing problem. Post-acquisition, the company lacked a common lexicon. Different departments used diverse language to refer to customers, accounts, resellers, or even what it meant to close a sales opportunity – which made it challenging to holistically determine overall sales progress. The data storage platform in use varied from team to team, and department to department. Datto leveraged multiple systems simultaneously, inclusive of Salesforce, AutoTask PSA, ZenDesk, Magento, Zuora and Netsuite and multiple internal applications and databases, withno synchronization between systems. "The whole means of expression and the way you describe facets of the business are just wildly different when you have many systems," said Brett McLaughlin, Chief Data Strategist at Datto. "Unless everyone is using the same system, you don't have a common company language, as it's represented differently in each data fiefdom."

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With so many different systems, the operational challenges started to reach a breaking point. "There'd be a sales prospect captured in multiple systems, and they would be assigned to multiple sales reps, which was highly problematic both internally and externally. There are serious operational problems that come with not understanding if you're talking to the same customer or prospect ten times, or talking to them one time," said McLaughlin. Internally, sales representatives became more frustrated with each other, as their prospects weren't unique to them. Additionally, this caused a level of customer confusion for those who had been mislabeled as prospects in one system but were already customers in another. Multiple systems presented massive duplications and conflicting data records. The company had no way to determine its actual customer base, which impacted their ability to execute on long-term business goals and properly identify what was coming through their sales pipeline to forecast appropriately.

Bringing in the Experts

Datto determined they first needed to select one central platform. The company immediately leaned towards Salesforce, as it was a CRM system that everyone felt was a smart, well-rounded choice. Many of their employees already had expertise in it, and so for the IT team, it was a "no-brainer." However, this Salesforce project was on a massive scale. Facing over 6,000 data fields to comb through that were spread across 76 different tables, each made up of up to 200 columns of data, McLaughlin and his team knew they needed to bring a partner on board to effectively complete this major data migration.

"Pretty early on in the process, we realized there was just such a flood of data in so many places," said McLaughlin. "It's like cleaning out a closet the size of a football field. Where do you even start?"

Datto brought the Astralis team on board to help in establishing a game plan. Together, the companies built a strategy for sourcing and organizing the company's sales and customer data, including a step-by-step process for migration. Organizing a data migration on this scale required two phrases - Discovery and Enablement.

Find, Decide, and Store: 6,000 Different Decisions

At the onset of Phase 1 (Discovery), the 8-person Astralis team helped guide over 100 Datto personnel in locating the source of each data point and figure. Given the many disparate systems in use, this required significant reconciliation. Astralis also engaged in one-to-one conversations with Datto team members across departments to establish priority data points. "People would be very cavalier about just getting rid of data... until they realized they needed it later on," revealed McLaughlin. "The Astralis team was prepared to guide everyone through the necessary steps to do it properly."

In just 2 weeks, Astralis helped profile the hundreds of columns of data that Datto had scattered across 12 different ZenDesks, 2 Zuora invoicing systems, and countless excel spreadsheets. According to McLaughlin, the guidance and expertise that Astralis brought to the project helped to "coral the chaos" as employees worked on making thousands of very specific decisions around the data they owned. The team then began to determine where to best store all relevant sources of data from Phase 1. In order to keep the Enablement phase ordered and streamlined, the Astralis team tracked each step in the migration through a rigid controls system in which only those authorized were able to access the project's files. From there, they translated the data information provided by Datto into an ETL process that effectively presented the data while directing users to the correct destinations. "It was like a puzzle of 10,000 pieces that were all black," stated McLaughlin. "The sheer volume of 6,000 fields made it so complicated...and that's usually more than most people can bear, but Astralis got it done through building scripts."

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Sales Success, A Year in the Making

Following the 2-month discovery phase and 5-month enablement portion of the project, the Astralis and Datto team continued working on the demanding task of consolidating multiple data sets, eliminating duplications, and ensuring all 6,000 fields of business-critical data migrated seamlessly to Salesforce. McLaughlin applauded Astralis during this process for "keeping people honest, and running a very tight ship," as Astralis also worked to prepare Datto employees to continuously prune down existing data and to maintain a new level of system organization and unity.

The data migration to Salesforce took close to a year to complete from the Discovery phase to the actual go-live date for all product lines. As McLaughlin said, "We went live and were waiting for the bomb to drop and none did." The positive impact of consolidating to one system was immediate. Most notably, sales representatives began to work off of one consistent list of customers and prospects, with no confusion about prospect status. Clear ownership of data significantly improved Datto's sales momentum, the business and user experience, and the general feeling of being one company. "Before the migration, it was easy to talk past people because everyone spoke a different language but now, people have the same lexicon," said McLaughlin.

Leveraging a single CRM system allowed Datto to re-examine their customer portfolio at an in-depth level. This drove more educated and calculated sales decisions. The business-critical insight stemming from Salesforce has allowed Datto to take its business to the next level and be valued appropriately by customers, prospects, and third parties.

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