

SAP to Salesforce Migration for a Leading Heavy Equipment Company

Client Overview

A major construction and materials handling equipment manufacturer, reseller, rental, and service provider sought to modernize its customer service operations by migrating from SAP Cloud for Customer (C4C) to Salesforce Service Cloud.

The goal was to enhance system performance, optimize data structures, and improve user experience without disrupting business operations.

Project Objectives



Challenges & Solutions

1. Complex Third-Party Integrations

Challenge
The SAP system was integrated with multiple eCommerce, Marketing, and ERP systems, requiring a step-by-step migration of each third-party connection.

Solution
The team rebuilt integrations in Salesforce, ensuring API compatibility and seamless data flow across platforms.

2. Lack of Detailed Technical Documentation

Challenge
Reverse-engineering the existing system architecture was necessary due to missing or outdated SAP documentation.

Solution
Developers conducted an extensive system analysis, reviewing SAP workflows and business logic to reconstruct processes accurately in Salesforce.

3. Handling SAP's Complex Data Structures

Challenge
SAP's rigid data model and object relationships made direct migration difficult.

Solution
The team implemented data mapping, validation processes, and phased migration, ensuring data integrity and accurate object relationships in Salesforce.

4. Maintaining Business Continuity

Challenge
The migration had to be executed while the business remained operational.

Solution
A Parallel Run approach was used, allowing both systems to function simultaneously for validation before entirely switching over to Salesforce.

Technical Execution

Custom Development & Configurations

- Created custom objects in Salesforce for areas where standard objects were insufficient.
- Developed custom UI elements to enhance usability and efficiency.
- Configured validation and sharing rules to ensure data security.
- Implemented Flows and Apex logic to automate business processes.

Data Migration Approach

- Leveraged Jitterbit ETL tools to transfer large volumes of data efficiently.
- Created data templates to transform SAP records into Salesforce-compatible formats.
- Implemented object relationship mapping to maintain data consistency.
- Conducted a phased migration strategy to validate data accuracy.

Security & Compliance Measures

- Performed data validation and parallel testing to ensure integrity.
- Configured Roles, Profiles, and Permissions to maintain proper data access control.
- Implemented encryption and compliance measures to align with industry standards.

Results & Business Impact

More Streamlined User Experience
Improved navigation and efficiency for employees.

Optimized Data Structures
Enhanced reporting and analytics with cleaner data.

Better System Performance
Faster load times and more responsive customer service operations.

Increased Engagement
Higher user adoption due to a more intuitive Salesforce UI.

Automation Benefits
Reduced manual efforts through Flows, Apex, and validation rules.

Lessons Learned & Best Practices

Key Takeaways for Future Migrations

- Conduct Detailed System Analysis**
Reverse-engineering legacy systems is essential.
- Use ETL Tools for Data Migration**
Structured data transfer ensures accuracy and security.
- Run Parallel Systems Before Full Migration**
Validates data integrity and minimizes risk.
- Optimize Security Settings from Day One**
Roles, Profiles, and Permissions should be configured early.
- Engage Stakeholders & End-Users Early**
Gathering input improves adoption and reduces friction.

Advice for Developers

- Don't Rely on Existing Documentation**
Perform hands-on analysis when necessary.
- Plan Integrations Carefully**
Ensure seamless data flow between legacy and new systems.
- Test Everything in a Sandbox**
Avoid deployment issues by thoroughly validating changes.
- Maintain Clear Communication**
Keep all stakeholders informed throughout the migration process.

Conclusion

The SAP to Salesforce migration was a **strategic success**, enabling the retailer to modernize its customer service operations. With optimized integrations, a user-friendly interface, and improved automation, the transition positioned the company for **greater scalability, efficiency, and customer satisfaction**.

