



CASE STUDY

Salesforce organizations consolidation for CyberFortress

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At a glance:

CyberFortress, a company in the backup products industry with 100 employees, sought to streamline its business processes by consolidating three separate Salesforce organizations into a single, unified platform. The objective was to improve team collaboration and enhance customer insights. Comtrade 360 provided a comprehensive solution that involved Salesforce org consolidation, including data migration, metadata migration, external integration management, and ongoing support. As a result, our client centralized its data, optimized workflows, reduced operational costs, and established a robust foundation for future growth.

Industry

Backup Products

Technology

- Salesforce: Data and metadata migration, automation, integration with external systems, and real-time data sync.
- Apex OOP: Salesforce programming language for advanced automations.
- SOQL: Salesforce Object Query Language for data management.
- Declarative Tools: Email alerts, workflows, flow builder, formulas, approval processes.
- APIs: For external integrations with websites, customer and partner portals, and billing systems

Introduction

Salesforce is established as the industry's leading tool for streamlining business operations in the ever-evolving areas of selling goods, services, or products. Business growth is achieved often through acquisitions, leading to managing multiple Salesforce organizations, each with its own set of data, processes, and workflows. This fragmentation can lead to inefficiencies, data issues, and a lack of important customer insights, which can reduce the efficiency of business results. A common approach to address these challenges is merging multiple Salesforce organizations into a single, unified platform with centralized data and standardized processes, which provide a comprehensive view of the customer base, improve team collaboration, and reduce the complexities associated with managing multiple organizations.

The Salesforce consolidation process starts with an analysis of the given set of organizations, defining a new, unique data structure and end-user oriented processes. Collaboration with the key stakeholders, marketers and sales team plays a pivotal role in structuring end to end business processes and including external integrations, managing customers from cold leads all the way to the invoicing process for done deals.

Our client approached our Salesforce team with a request to merge three existing organizations, each with its own automated processes, data structure and external integrations. The goal was to establish a new Salesforce organization from scratch, automate data input and manipulation processes that would help them optimise their business processes, which is further explained in detail.

Background

Industry: : Backup products

Employees: 100

Objective: Create a new Salesforce organization by consolidating three existing.

Scope and Objectives

The primary objectives of the consolidation were:

1. Analyse the existing organizations: Study the data structure, automated processes and external integration that are specific to each organization.
2. Create a unified data scheme: Identify key information for specific object and establish the scheme on the new Salesforce organization.
3. Migrate data & establish real-time data sync: Migrate data from all organizations, establish external IDs and create automated real time data sync between new and all old organizations.
4. Metadata migration: Collaborate with key stakeholders, marketers and sales teams and define the unique automations, which are either migrated or created from scratch depending on the similarity to the existing automations.
5. Handle external integrations: Consider any websites or web portals associated with the old Salesforce organizations and direct them to the new Salesforce instance.
6. Train Salesforce users: Create documentation and demos for end-users to enable efficient usage of the new Salesforce instance.
7. Perform cutover: Remove user access to old Salesforce instances and start using new Salesforce instance as the primary one.

Methodology

The Salesforce organization consolidation followed a structured approach consisting of the following phases:
Determine the goal: Collaborate with key stakeholders to determine what is the goal of the new Salesforce instance.
Create new Salesforce organization: Define new data structure, create new Salesforce environment and prepare it for the migration.

Migration :

- Data
- Metadata (automations)
- External integration (web portals, web pages, external applications)

Cutover & ongoing support and development: Train users and perform cutover to the new Salesforce instance.

Phase 1: Determining the goal

The projects started with clear definition of the end goal. With that in mind, we have started meeting with key stakeholders, ranging from CEO, CFO, Marketing Director, to Sales Team Leaders and Director of Informatics, seeking a common ground on the new Salesforce environment specifics.

We have defined the key information from business perspective for customers, products and deals, which plays a critical role in defining the new data schema.

Rough definition of budget allowed us to consider how to structure the end-to-end business processes, which external integrations to preserve and how these changes will affect the existing automations in place.

Phase 2: Create new Salesforce organization

Organizing the data plays a vital role in the effectiveness of the new Salesforce instance. Focusing on the key business information defined in the first phase, we have analyzed the old Salesforce organizations and their data structure, defining the manipulation that have to be performed prior to the migration steps.

Once the old data is prepared for migration, a new Salesforce environment is set up. We have created the determined data structure, consisting of standard and custom objects, custom fields and relationships. We have considered creating new record types, which are specifically designed in order to keep track of the data origin – the Salesforce environment it originates from.

We have established external IDs, that allows us to keep track of same information both on the new and old Salesforce organizations. The last step prior to the migration was to prepare the automated real time data sync – scripts that are placed on the Salesforce organizations subject to consolidation until the new Salesforce organization becomes the primary one.

Phase 3: Migration

- Phase 3.1 Data migration

Data migration was performed on each organization separately, done outside the active business hours of end-users. After the migration was finished, validation checks were performed by our team as well as by end-users from the client's side. Lastly, the automated sync was activated. Once all organization migrations were done, deduplication was performed on the new Salesforce instance.

- Phase 3.2 Metadata migration

The definition of automations to be held in the new instance was already defined in the scope of Phase 1. Metadata migration started with the Salesforce packages installation and configuration and was followed with the automations that were subject to either no changes, or minor ones. Those were migrated from the old instances they originated from and adapted to the new Salesforce organization, where needed. New automations or those that required a lot of adaptation changes were created from scratch on the new Salesforce organization, using the declarative tools (email alerts, workflows, flow builder, formulas, approval processes) and Apex OOP Salesforce programming language with combination of SOQL – Salesforce Object Query Language.

- Phase 3.3 External integration migration

The last phase of migration included external integrations. We have established the APIs between the lead generating websites, customer & partner portals and billing portals that were part of the new instance. While all external portals didn't have a direct connection to the Salesforce organization itself, we have established processes for creating the documents in Salesforce, which are exported and then used with other portals. Not all of the external integrations had at least two instances, so we have simulated the behaviour with mock tests to ensure that automations will work as expected when it's time to point them to the new instance.

Phase 4: Cutover & ongoing support and development

As the new environment was prepared to go live from a technical standpoint, it was time to train the end-users on efficient usage and the changes they will be subject to on the new instance. Documentation was built along the configuration of the new organization and, in addition to the more complex solution, we have filmed demo examples of use. Both demos and documentation were provided to the client's team leaders, who then shared it with end-users.

Once the learning process was complete, we have performed final checks to ensure data is up-to-date, which was again confirmed both from our team and the client's side. After successful tests, the cutover date was determined, where we have collaborated with the external integrations' owners from to ensure seamless transition of external integrations to the new instance. After performing the tests with those integrations, old instances went into freeze mode (removing user access, but keeping them around if needed) and the new instance became the primary one for all business going forward.

Performing the consolidation process does not end the project, because of rapidly evolving Salesforce ecosystem, in which keeping track with other business competitors, following trends and best practices is required for optimal business results.

Key Recommendations

1. Clear goal definition - ensure that you communicate the new Salesforce environment's goal both with key stakeholders and end-users – those tend to have more in-depth information that may critically affect further decisions.
2. Understand client's budget and needs for appropriate consulting on the type of Salesforce organizations, installed packages and external portals.
3. Perform any data manipulation on old organizations ahead of initial migration – keep the new Salesforce instance as clean as possible.
4. Ensure old org – new org sync first with External IDs and then with real-time sync, not to allow any discrepancies between Salesforce organizations post first migration to the cutover step.
5. Strive for declarative (codeless programming) Salesforce tools to create automations, allowing for easier support & debugging.
6. Create comprehensive documentation with building features – end-users are often non-technical people and the training material should be clear and easy to understand.
7. Establish permissions across all users to ensure the safety of the data and Salesforce environment in general.

Conclusion

By centralizing our client's data and processes we have eliminated redundancies, enabling more efficient workflows and streamlined collaboration across teams. As a result, our client has optimized their sales processes, reduced operational costs by removing the need for three separate Salesforce instances, and enhanced customer satisfaction. Having unified Salesforce instances, we provided a robust foundation for further growth, allowing effective responses to market demands and new opportunities.

Ready to optimize your Salesforce environment? Visit [Comtrade 360](#) to explore our tailored solutions for seamless consolidation and enhanced business performance.



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