Achieved 30% Cost & Time Savings with Seamless Data Migration Between Salesforce Orgs

Insight

A market leader in virtualized cable access & live video streaming wanted an efficacious framework to consolidate data in the multiple Salesforce orgs quickly with minimal expenditure but encountered problems with the standard Salesforce Loader.

The client used FloData Salesforce Accelerator to migrate the master data - comprising product, pricing, bundles/configurations, and rules - between the different Salesforce instances with minimal configuration. This resulted in accelerated sales, improved KPI tracking and customer experience, and 30% cost and time savings for the technology client.

Industry	Revenue	Employees	Headquarters
Telecommunications	$150+ M	1k+	California, US

Business Challenge

Organizations usually procure Salesforce partial sandboxes for their development and testing cycles and to shorten the testing cycle time.

The client used the standard Salesforce Loader to migrate the product catalog and product configurators setup in the Salesforce environment to the Salesforce QA, UAT, and Production environments. But it encountered multiple errors because Salesforce Loader failed to validate the object dependencies.

The other significant obstacles witnessed by the client were:

- Poor visibility and ineffective data flow.
- Migration of sensitive legacy data.
- Migration of workflow history & audit trail data.

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Transformation Journey

Forsys along with FloData team met the stakeholders, examined their existing approach and practices. After analyzing the process, business and data, the FloData experts used the FloData Salesforce Accelerator, best practices and the highest security standards to design, propose, and implement a custom solution.

The key highlights of the approach to the solution are:

- Data Mapping from source to target.
- Automation of data migration.
- Data import and reconciliation.
- Reporting of errors.
- Migration of master data, including product, pricing, bundles/configurations, rules, from one environment to another.

- Migration of updated products.
- Data analysis of the existing data & identify the exceptions if any.
- Data confirmation to the new process.
- Identification of the data quality metrics while taking the impacts into account.
- Migration of all dependencies with the data.

Impact

Since the migration, the client observed:

→ **Automation of data migration between multiple Salesforce instances.**

→ **Easy movement of Conga products and configurators between environments.**

→ **Increase in sales, better tracking of KPIs and customer experience.**

→ **Improved forecasting & collaboration between stakeholders.**

→ **30% cost and time savings.**

About the Client

The client is an American video delivery technology and services business that enables media companies and service providers to deliver ultra-high-quality broadcast and OTT video services to consumers globally.

Technology/Tools

Salesforce, FloData Salesforce Accelerator

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