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Top Fortune 500 Company Migrates Over 42K Records to Salesforce with Forsys' MnA App for Salesforce, Achieving 100% Operational Independence

Insight

A global data storage leader faced challenges in splitting into two independent entities, including data complexity, account segmentation, business continuity, splitting their Salesforce instance without ready-to-use tools under tight timelines, and aligning with an integrated IT ecosystem, complicating data migration.

To address the challenges of splitting their Salesforce org, the client leveraged Forsys' MnA app for Salesforce to facilitate a seamless migration. This approach empowered both entities to operate efficiently with optimized workflows and zero operational disruptions. Forsys' MnA app for Salesforce executed the migration which involved management of data relationships & object sequencing dependencies, verification of data accuracy through reconciliation reports, & implementation of error reprocessing for seamless correction and resolution. This resulted in the successful migration of 6,394 accounts and 42,660 user records to production, ensuring 100% operational independence, simplified data complexity, and optimized business processes.

Industry
Computer Hardware Mfg

Revenue
~$5B

Employees
20K+

Headquarters
California, US

Business Challenge

For the computer hardware manufacturer, efficiency and strategic adaptability were crucial as they navigated a major organizational shift. Following an acquisition a few years ago, the client operated as a combined entity for several years. However, evolving market priorities and shifting business performance led to a strategic decision: spinning into two independent companies—one for HDD and one for Flash.

This transition led to a series of complex challenges:

➡ Salesforce org split constraints due to the lack of ready-to-use tools, making CRM and data management difficult under tight execution timelines.

➡ Salesforce org split complexity with the need to align with an integrated IT ecosystem, including Oracle ERP Cloud, SAP ECC, and multiple connected systems - complicating data migration and dependencies.

- Fragmented CRM and data management due to the Salesforce org split, with no ready-to-use tools for quick execution.
- Complex data dependencies from integrated systems like Oracle ERP Cloud and SAP ECC, making the Salesforce org split more challenging.
- Embedded ERP integrations between Oracle ERP Cloud and SAP ECC required careful disentangling to ensure a smooth business transition.
- Established IT dependencies necessitating independent operation of the spun-off unit's systems, including Oracle ERP and peripheral applications, achieved through cloning and migration strategies to minimize disruptions.

Transformation Journey

Facing a tight deadline and lacking readily available tools to split their Salesforce instance, the client's IT team, after evaluating potential solutions, selected Forsys' MnA App for Salesforce, as the optimal choice.

Here are the key highlights:

- Handling object sequencing dependencies to maintain process integrity.
- Verification of data with reconciliation reports to ensure data accuracy post-migration.
- Error reprocessing for seamless correction and resolution.
- Data extraction from the source system is done through the Salesforce connector with the MnA App for Salesforce.
- Migration of related records (e.g. accounts, contacts, opportunities) with dependencies intact during the Salesforce instance split to prevent orphan records.
- Ensuring that referenced records are migrated prior to dependent records to maintain relational integrity.
- Transformation and validation of the extracted data to ensure accuracy and consistency before integration into the new system.
- Migration of the cleansed data into the target system using the Salesforce connector, facilitating a seamless transition.
- Verification of data integrity through lookups, cross-verifying and validating the loaded data against existing records.
- Documentation of success and failure reports post-data loading, providing comprehensive insights for reporting and continuous monitoring.

Key considerations for migration

- Sequencing of parent objects first to ensure Accounts, Users, and Contacts exist before child records are migrated.
- Using external IDs for mapping to avoid issues with newly generated Salesforce Record IDs.
- Handling of lookup & master-detail dependencies by migrating parent objects before their related child records.
- Disabling triggers & workflows temporarily to prevent unintended automation during migration.
- Validation of data by cross-checking record counts and relationships post-migration.

Impact

- 100% independent operations
- Simplified data complexity & optimized business operations
- Migrated 42,660 user records to Production
- Zero data loss or disruptions, ensuring business continuity
- Enhanced data accuracy for better decision-making
- Optimized workflows, reducing administrative overhead

About the Client

The client, a Fortune 500 and S&P 500 company, is a global leader in data storage solutions. With its ideas and innovative products, it has transformed the electronics industry for over 25 years. Today, its state-of-the-art solutions are at the heart of many of the world's largest data centers and embedded in advanced smartphones, tablets, and PCs.

Solution Components

MnA App on FloData, Salesforce