

Delivering value to clients – Sample case studies

**Business process outsourcing and professional services company**

The client went through a large transformation programme to revamp their sales and marketing capabilities. Data was key in this initiative and they wanted to move their legacy data to a cloud based modern platform (Salesforce).

PwC were responsible for managing the end to end process for the extract, cleanse, enrichment, de-duplication and load of data from source systems into the CRM global template (GT) and Marketing Automation solution (MAT).

Our PwC technical accelerators and distributed delivery model enabled the client to reach their goal of migrating to Salesforce faster while minimising project risk and reducing time for completion. The client now has a single cloud hosted platform that enables them to gain immediate insights from their data, save time and provide a better and improved marketing and client experience.

Our core offering of world class people, processes and technologies were central to the success of this engagement. PwC are able to operate and deliver remotely, transcending the boundaries of geography, to bring our business knowledge and awareness to create value for clients.

**Executive search company**

The systems used to manage the client’s information today were no longer able to support the requirements of the organisation in a user friendly, value for money and responsive way.

PwC were responsible for delivering the Digital Transformation programme that consolidated the clients processes onto a digitally enabled Customer Relationship Management (CRM) platform (Salesforce).

Our PwC technical methodologies and frameworks, coupled with a robust distributed delivery model were fundamental for the client achieving their vision of a data migration strategy in a managed environment. The newly deployed Salesforce platform enables the client to mine their data to unlock insights and create additional business value through effective campaign management and greater client experience.

Our track record, our capabilities and credentials on cloud data migration were fundamental for this engagement. PwC has deep knowledge and expertise in data migration and was able to clearly articulate and distil complex messages to the client.

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Salesforce data migration

Data is integral to nearly every aspect of business today and looking after your data, as well as leveraging data as a competitive asset, is becoming the difference between success and failure for companies.

Today and tomorrow’s market sees a cascade of clients seeking to move central systems to| The Cloud. We see many organisations struggling with their Salesforce data migration efforts because of 3 common themes:

1

Complex design customisation requirements

2

A disconnect between the business strategy and the Salesforce data migration

3

Not enough time given to business validation and user acceptance testing (UAT)

Data issues have a direct impact on a business’s operational processes and whilst some companies ignore the importance of data migration, others recognise that the success of their transformation programme depends upon it.





Why is it an issue now?



My business is transforming

Clients often overlook the importance of the recommended steps in a Salesforce data migration as more focus is given to the implementation itself and not enough focus is given to the data migration steps and activities. This underestimation leads to high risks and challenges when completing UAT and cutover.

My business needs simplification, cost reduction, efficiency and the ability to comply with regulations and compliance

An effective Salesforce data migration enables good business strategy in an agile and evolving market. It enables businesses to go to market with one commitment, that their data is right.

Data that's not fit for purpose

Salesforce does not have any proprietary data quality, cleansing or management tools or accelerators which can tackle data issues for a Salesforce implementation. This will leave you struggling to extract value from the data you've got and to get your the data to meet your management information reporting needs. A holistic custom data management is required to ensure good data is successfully migrated.

The benefits of getting it right



There are some common elements of good Salesforce data migration practice that universally apply:

- 1. **You have accurate data** in your Salesforce platform for reporting and MI that you trust and you know is reliable and is fully integrated with your IT systems.
- 2. **Reduction in project timeline** creating a shortened time to complete data migration and a reduction in the overall project costs and risks of project overruns.
- 3. **Immediate access to insights from data** Salesforce provides data driven information on your clients, contacts and opportunities. A successful migration means that you are able to act on the data to get the results you need.
- 4. **Gain visibility into networks and activity** Gain a comprehensive view of your relationships and related activities in the market and globally.
- 5. **Global and local collaboration** You are able to easily collaborate globally across accounts to understand your clients' needs and share knowledge faster.

Our point of view



Give data a voice in your transformation programme

When moving your business onto Salesforce, make sure data is addressed at the start. Without good master data and a correctly defined Salesforce data migration programme, business processes can't work.

Align your migration strategy to your design requirements

Many Salesforce implementations fail to deliver the value or suffer cost overruns due to lack of a focussed migration strategy. A higher degree of customisation creates more complexity in testing business scenarios before the migration. The customisation in Salesforce data structure needs to be synced up with migration and implementation team to avoid future unprecedented business situations.

Understand what really matters

You need to understand what data to migrate to Salesforce and agree this internally. Without business agreement and internal alignment, Salesforce data migration programmes can become victim to delays, budget overruns and deployment failures.

Getting the conversation started



Here are some examples of when to act:

- 1. **You are embarking** on a Salesforce transformation programme to transform your sales and marketing capability where your data will be impacted or new data will be introduced.
- 2. **You have had issues with data quality** and reporting and you are trying to leverage data to improve business performance.
- 3. **You look at systems and processes in isolation** from one another, rather than as a coordinated set of functions that can be examined to understand your operations and their impact.
- 4. **You have insufficient** Salesforce data migration expertise and you lack of formal Salesforce data migration strategy, methodologies and frameworks.
- 5. **Your reporting** process is predominantly manual and inefficient which leads to errors and out of date information.

How we help in practice



**Delivery at scale:** PwC have delivered large scale Salesforce data migration transformation projects with more than **100 data migration projects** executed across industries and territories. We bring a **specialised viewpoint and provide a customised approach**, based on our critical success factors specific to Salesforce, working collaboratively and iteratively alongside you to deliver the end to end data migration. Our experience of Salesforce data migrations will help you understand the **'art of the possible'** of your Salesforce relationship, collaboration and sales platform. **The benefit of our deep, technical experience is that we will help you develop and navigate the complexities of a Salesforce data migration, effectively managing business engagement throughout.**

**PwC accelerators** PwC has Salesforce **specific frameworks, methodologies and technical assets** to accelerate and streamline your Salesforce data migration end to end process.

PwC owned digital accelerators provide a migration toolkit based approach – including templates, test scripts, transformation logic and connectors – to automate, standardise, cleanse, visualise and transform your data. **Our accelerators will reduce time, effort and manual intervention whilst increasing the productivity of the team.**

**A distributed delivery model** We have a **25+ strong team of SMEs specially dedicated to Salesforce and a CRM data migration centre of excellence with more than 200 individuals in it.** Our distributed delivery model leverages the best in technological expertise from our teams in PwC India, we provide specialist on the ground support from our UK firm, PMO support and governance through our PwC Operate teams in Ireland and best in class design and processing abilities from our Poland team. **The benefit of this model is that you get access to world class resources and you unlock additional cost savings.**

Highlights of our approach

1

**Our distributed delivery model**

Leveraging the best suited skills from PwC network across >150 countries including local support

**Ability to collaborate** and bring in the strengths and capabilities in the **PwC network with robust conferencing and global mobility framework**

Our model leverages the **best in technological expertise** from our teams in PwC India, we provide **specialist on the ground support** from our UK firm, **PMO support and governance** through our PwC Operate teams in Ireland and **best in class design and processing abilities** from our Poland team

2

**Our assets and accelerators**

**Pre-built profiling**, cleansing and validation rules library and downloadable quality reports

**Easily configurable** data transformation rules and ease of high volume processing using Big Data stack

**A workbench** for business users to manually cleanse the data

**An interface** to export data in the format of the user's choice

**An interface** to execute reconciliation scripts and dashboards to monitor discrepancies

**Easy to create customised** screens for data cleansing workflows

3

**Our expertise and experience**

Support delivered through a trusted partner

**25+ Salesforce subject matter experts (SMEs)**

**200+ data migration COE**

**Ability to scale, flex and deploy resources on the ground or remotely**

**Breadth of skills and expertise including functional and technical**

Minimise the risk of a failed Salesforce implementation through best in class subject matter expertise providing advice, challenge and recommendations to deliver your Salesforce data migration activity and programme transformation

4

**Return on investment, enhanced performance, improved decision making and competitive advantage**

**Unlock the value** from the large investment in Salesforce through improvement in data quality, processes and controls

**A comprehensive Salesforce** migration delivers a world class user friendly system which provides access to the right data at the right time for people to do their jobs day to day

**Robust information** supports more confident and agile decision making leading to increased competitive advantage and market standing. **This will give you confidence** to develop new propositions and services within Salesforce

