

salesforce

Data Migration Made Easy

Antonina Romanova
Lead Consultant, Purple Vision

Antonina.Romanova@purple-vision.com
@AntoniaRomanova



Forward-Looking Statements

Statement under the Private Securities Litigation Reform Act of 1995:

This presentation may contain forward-looking statements that involve risks, uncertainties, and assumptions. If any such uncertainties materialize or if any of the assumptions proves incorrect, the results of salesforce.com, inc. could differ materially from the results expressed or implied by the forward-looking statements we make. All statements other than statements of historical fact could be deemed forward-looking, including any projections of product or service availability, subscriber growth, earnings, revenues, or other financial items and any statements regarding strategies or plans of management for future operations, statements of belief, any statements concerning new, planned, or upgraded services or technology developments and customer contracts or use of our services.

The risks and uncertainties referred to above include – but are not limited to – risks associated with developing and delivering new functionality for our service, new products and services, our new business model, our past operating losses, possible fluctuations in our operating results and rate of growth, interruptions or delays in our Web hosting, breach of our security measures, the outcome of any litigation, risks associated with completed and any possible mergers and acquisitions, the immature market in which we operate, our relatively limited operating history, our ability to expand, retain, and motivate our employees and manage our growth, new releases of our service and successful customer deployment, our limited history reselling non-salesforce.com products, and utilization and selling to larger enterprise customers. Further information on potential factors that could affect the financial results of salesforce.com, inc. is included in our annual report on Form 10-K for the most recent fiscal year and in our quarterly report on Form 10-Q for the most recent fiscal quarter. These documents and others containing important disclosures are available on the SEC Filings section of the Investor Information section of our Web site.

Any unreleased services or features referenced in this or other presentations, press releases or public statements are not currently available and may not be delivered on time or at all. Customers who purchase our services should make the purchase decisions based upon features that are currently available. Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements.

Agenda

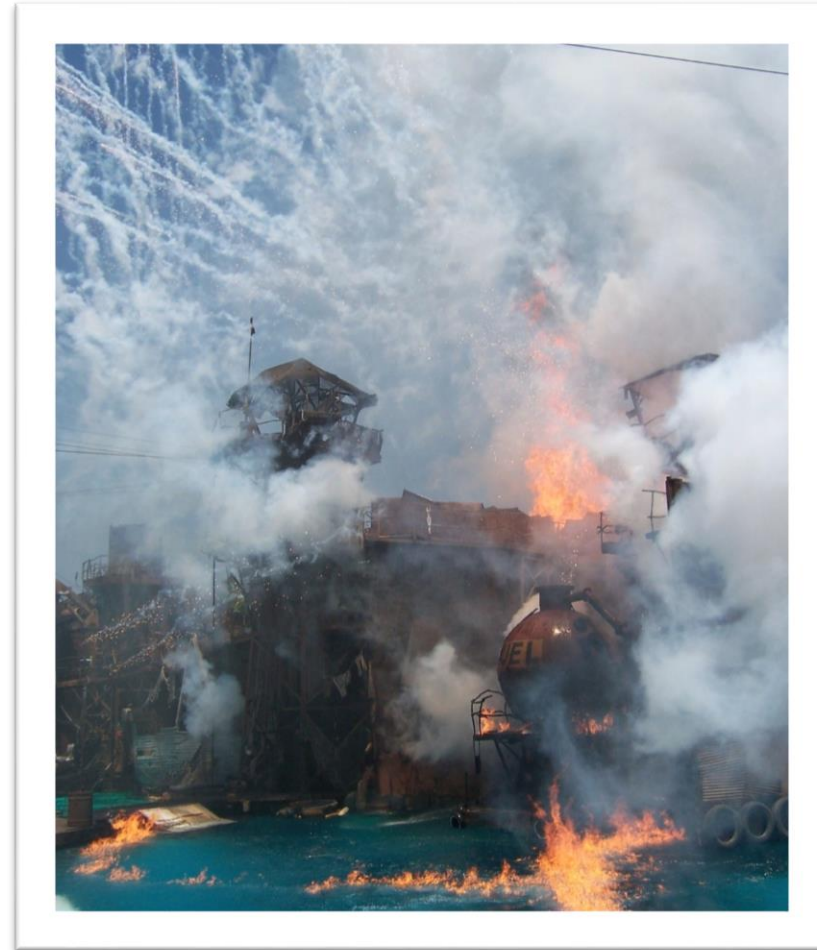
- Why to take data migration seriously
- Data migration strategy
- Common data migration issues
- Data migration tools
- Experience based best practices



Why to Take Data Migration Seriously

Good System + Bad Data = Disaster

- Adoption Problems
- Customer Relationship issues
- Decrease in Revenue Generation
- Analytics problems



Data Migration Strategy

Data Migration Steps

- Identify stakeholders
- Understand data
- Prepare data and a destination org for migration
- Complete and verify a test migration
- Migrate and validate data

Data Migration Strategy

Identify Stakeholders

- Not necessarily high level managers
- Can be from different departments and teams
- Know good and bad aspects of data
- Need to be available throughout all stages of project

Data Migration Strategy

Understand Data

- What data needs to be migrated
- Where is it stored
 - In a legacy system(s)
 - In an integrated system(s)
- How is it structured
- Where and how should it be stored in Salesforce
 - New and existing objects and fields
 - Data mappings
 - Data validations
- Is your data clean
- Is some of this data already stored in Salesforce
- How will data migration affect existing Salesforce data and users



Data Migration Strategy

Prepare Data and Destination Org for Migration

- Prepare data for migration
 - Clean data
 - Ensure it is structured and formatted correctly
- Configure Salesforce for data migration
 - Add required objects and fields if absent
 - Define required validations
 - Make sure non-required validations, field updates and notifications can be disabled
- Configure data access
- Automate migration where possible
- Design communication plan

Data Migration Strategy

Complete and Verify a Test Migration

- Migrate a subset of data into a Sandbox
- Validate data, identify and fix issues
- Migrate a full set of data into a Sandbox
- Repeat a data validation step
- Record exceptions and agree on a strategy for them
- Multiple test migrations might be required

Data Migration Strategy

Migrate and Validate Data

- Allocate time and resources
- Communicate upcoming changes and consequences
- Complete data migration and validation
- Communicate completed changes and further steps

Common Data Migration Issues

- Poor data quality
- Insufficient tools and human resources
- Failure to translate data into a new structure and format
- Absence of data governance policies
- What will affect newly migrated data in Salesforce
- Will new data affect existing data
- Lack of testing
- Unforeseen data issues and exceptions
- Communication issues
- Access and permissions problems
- Training issues

Data Migration Tools

- Import Wizard
- Data Loader
- Force.com Excel Connector
- Dataloader.io (by MuleSoft)
- Jitterbit Data Loader
- DemandTools (by CRM Fusion)
- Informatica
- Talend Open Source
- Custom built data migration tools

Experience Based Best Practices

- Is there a perfect tool that can do it all?
- Who should be involved into the process? Is it just Admins?
- Start early
- Allocate enough time – exceptions hide well & cause delays
- Identify the right people
- Provide the right tools
- Don't skip testing & don't reduce testing time
- Verify results after each migration - even test ones
- Don't leave migrated data on its one – look after it

When All Work Is Done



thank y  u

Q&A