



CASE STUDY

DecisivEdge Salesforce Practice Migrates Sage CRM to Salesforce

INTRODUCTION

A leading File Storage and Record Management Services company that used Salesforce as their CRM acquired a smaller company operating on Sage CRM. To unify their operations, they needed to migrate Sage CRM data to Salesforce while ensuring key data remained intact and properly linked. The data sets included Leads, Accounts, Contacts, Opportunities, Events, Tasks, and Custom Objects.

CHALLENGE

Migrating from Sage CRM to Salesforce posed several key challenges that required meticulous planning and execution:

- **Historical Data Accuracy:** Ensuring crucial historical records, including created and last modified dates, were correctly migrated to Salesforce without any loss of information.
- **Data Formatting Differences:** Sage CRM and Salesforce have different data structures. The migration required careful mapping to align Sage CRM's proprietary data with Salesforce's model while preserving all relevant fields and relationships.
- **Maintaining Data Relationships:** Ensuring that links between objects such as Accounts, Contacts, and Opportunities remained intact post-migration for accurate reporting and seamless operations.
- **Task Data Conversion:** Converting task-related data from Sage CRM into Salesforce's task and activity system while maintaining details such as timestamps, notes, and ownership.

SOLUTION

DecisivEdge implemented a structured, step-by-step approach to successfully execute the Sage to Salesforce migration.

Assessment & Planning:

- Conducted a comprehensive analysis of Sage CRM's data, workflows, and processes.
- Defined clear migration goals focused on data integrity, user experience, and improved reporting.
- Developed a structured migration plan with defined milestones and responsibilities.

Data Mapping & Cleansing:

- Mapped Sage CRM data to corresponding Salesforce objects, ensuring seamless transitions for Leads, Accounts, Contacts, Opportunities, and Tasks.
- Performed data cleansing by removing duplicates and correcting inconsistencies before migration.

Customization & Configuration:

- Configured Salesforce to align with the client's business processes, including custom objects, workflow automation, and reporting enhancements.



SOLUTION (Cont.)

Data Migration Execution:

- Extracted data from Sage CRM using API-based exports and CSV files.
- Transformed and formatted data to match Salesforce's structure, particularly for task-related records.
- Loaded data into Salesforce using Data Loader, ensuring accuracy and maintaining key relationships between records.

Testing & Validation:

- Conducted rigorous validation to confirm that all records were correctly migrated and reconciled against Sage CRM data.
- Tested Salesforce functionalities, including automation and reporting, to ensure smooth post-migration operations.
- Engaged key users in a User Acceptance Testing (UAT) phase to confirm the system met business needs.

Training & Go-Live Support:

- Provided end-user training to ensure a smooth transition to Salesforce.
- Delivered post-migration support to address any issues and optimize the system based on user feedback.

RESULTS - Sage CRM to Salesforce Migration

By leveraging DecisivEdge's expertise, the client successfully completed their Sage to Salesforce migration with the following key outcomes:

- ⇒ **Data Accuracy & Integrity:** Historical data, including timestamps and relationships, was fully preserved and correctly formatted in Salesforce.
- ⇒ **Optimized Data Structure:** Proper sequencing of data loads ensured smooth transitions—for example, loading Accounts before Contacts.
- ⇒ **Improved System Efficiency:** Salesforce was optimized to enhance usability, streamline workflows, and improve reporting capabilities.
- ⇒ **Seamless User Experience:** The transition was smooth, with users quickly adapting to Salesforce's interface and functionalities.

By partnering with DecisivEdge, the client successfully transitioned from Sage CRM to Salesforce, ensuring all critical data—including Emails, Log a Call, and To-Do Tasks - were accurately migrated.

With DecisivEdge's structured approach, the record management company seamlessly adopted Salesforce as their central CRM, enhancing efficiency, maintaining data integrity, and positioning themselves for future growth.

ABOUT DECISIVEDGE

DecisivEdge leads organizations through their transformation journey. We believe that the right mix of people, processes, and technology will drive modernization, business optimization and automation. To learn more, please visit our website at www.decisivedge.com, email us at getresults@decisivedge.com or contact us at **302.299.1570**.