Goal – Move the CRM application from an on-premise to an on-demand environment. The below post the benefits and best practices of migrating from Siebel to Salesforce.com.

Cons of Siebel environment

High cost of maintenance • Existing CRM investment • Customer centricity • Long development cycles • Recurring infrastructure out of our existing flexibility challenges environment • User experience • Limited user involvement • Reactive nature of many front stage limit adoption and success organizations • Transformation is non-Intuitive and inflexible • Rigid and limited innovation change

Why Replace Legacy CRM On-Premise IT Cloud CRM Platforms

Cloud CRM Platorm (Salesforce) provides

High real-time interactivity • Rapid innovation • Flexibility • Omni-device and Omni-channel • Increased business engagement, process ownership • User adoption and efficiency •IT needs less focus on infrastructure • No downtime • Rapid development • Ease of maintenance • Ease of release management • Ease of governance

Key Considerations in Migrating from Siebel to Salesforce

The heart of any modern solution, especially CRM, relies on data. Data is the personification of a customer in the enterprise. Over the years, most companies have built up considerable data stores in their Siebel solutions, which is tremendously valuable, even if the solution housing it no longer is. As you plan your data migration from Siebel to Salesforce, consider data cleansing; there is little value in moving dirty or repetitive data from one system to another.

Tools for migrating from Siebel to Salesforce

Migrating existing Siebel CRM application to Salesforce is a composite process. This entails two primary activities –

i. Legacy data migration and
ii. Enterprise systems integration.

Data migration includes identification, extraction, cleansing, transformation and loading of the legacy data to Salesforce.

Integration encompass establishing a homogenous and automated data flow among various systems. It involves analysis and design of data flow diagrams, Use Cases and choice of integration technologies.

i. Data Migration: ETL tool is used for extraction of the selected set of data from the operational database and applying the transformation rules on them before transmitting to Salesforce. During transmission phase the transformed data from staging schema moves to the cloud. Salesforce out of the box equipped with lightweight and platform independent tools: data-loader and bulk-loader. Data-loader is the best choice if number of records is less than 1 million. However, bigger migration requires bulk-loader. Here we will concentrate on bulk-loader. Bulk-loader uses customize schema mapping between sources(on-premise) and sink(Salesforce) to determine the placement of the data in the cloud. This tool is efficient enough to transmit 5 million records per day. Salesforce internally splits any given batch into smaller transaction units. On successful completion of every transaction, Salesforces acknowledges the caller system with ACK message. Integrity of transaction and data is taken care by the Salesforce system.
   Risk mitigation strategies in data migration:
   a. Staging schema: Performing transformation logic on an operational database is an extremely error prone and high risk operation. It may lead to loss of existing data, data corruption and poor user experience. As a best practice, staging schema is utilized for the data loading and transformation.
   b. Market by market roll out: As a best practice, migration should be a phased approach, not a flash cut to minimize the risk.
   c. Connectivity: As a best practice, connectivity between various data sources in different sand boxes need to be validated.
   d. Security: In data migration process, use of DMZ proxy is mandated. The proxy will terminate all the inbound traffic based on the IP range. Also transmission of the data requires 128 bits encryption
   e. Monitoring: Unsupervised operation is considered as a main source of risk. Migration should be monitored and controlled.
   f. Governance: As a practice, Salesforce has restricted the number of transactional batches to 250,000 per day

ii. Integration with enterprise systems: Defining the system integration strategies requires profound understanding of the various use cases and data flow among them. Like any CRM systems, Salesforce need to be integrated with other enterprise systems to establish automated data sync between the upstream and downstream systems. Integration between two systems means, two systems will communicate/notify each other on occurrence of the specified events. There are quite a few established enterprise application integration (EAI) methodologies that exists, such as real time Webservice based point-to-point integration, messaging based asynchronous integration, and batch feed. Selection of EAI

methodology is context specific, which considers – business criticality of the data, life span of the data, asynchronous communication, synchronous communication, guaranteed delivery of the data, size of the data to be uploaded.

If the two systems need to know data in real time, synchronized Web service is the right EAI methodology. If the caller system need to notified asynchronously then service bus is a better option. On the other hand, if a large chunk of data needs to be transmitted between the system and in non-real time, then batch feed would be ideal way.