

***The Situation***

Integra's client, a leading financial services firm, had a substantial existing implementation of Siebel Financial Services CRM 7.7 that, over the course of nearly 8 years and numerous versions and upgrades, had been heavily customized and integrated with a complex web of many enterprise and external systems, driven by dozens of Unix shell scripts and direct SQL queries, and only lightly documented. The result: a cumbersome system, encumbered by a great many obsolete "artifacts" of business requirements past, that required the close and constant hands-on attention of a dedicated team to maintain production operations. When this financial services firm decided to constitute a new business unit to respond to the changing market conditions of the 2008/2009 global financial crisis, they were forced into a decision: upgrade to Siebel 8 at great expense and time commitment, or re-platform their CRM system in its entirety. With Integra's assistance, this client evaluated a number of leading CRM applications, and finally selected Salesforce.com as the platform upon which to support their newest business unit, as well as all other business units already on Siebel. Following our client's decision in favor of Salesforce.com, Integra was engaged to perform the conversion from Siebel to Salesforce.

***The Challenge***

Any conversion from one CRM system to another holds a variety of challenges. But this particular conversion was made unusually complex by the highly-customized nature of the existing Siebel system, and the stark lack of documentation relating to those customizations and integrations. Further complicating the situation was the requirement to establish full bi-directional real-time integration between the new Salesforce.com system and the existing

Siebel instance, in order to permit a phased transition of business units from Siebel to Salesforce. Finally, a months-long delay was incurred in the project start, which stood at odds with an inflexible go-live date.

***The Solution***

Integra brought to this client a deeply experienced team of functional, technical, and project-management CRM consultants, each individually experienced in *both* Siebel CRM and Salesforce.com, to guide and execute this complex conversion project. Our first task was essentially a "forensic investigation" of the existing Siebel system, looking at configurations, scripting, data-model extensions, interfaces, and the myriad home-grown Unix shell scripts that drove the system, to determine "what had been done and why"; in order to derive a baseline set of requirements for existing business units that would serve as a starting point for development and refinement of functionality and data integration requirements in Salesforce.com. In parallel with this process, Integra's team helped our client develop a full architectural approach for integrating Salesforce.com into its existing environment, and establishing the required real-time bi-directional integration with Siebel. Recognizing that data architecture was one of the most complex aspects of this initiative, and that functional requirements for the first business unit to go live would be fairly standard, our team took a "data first" approach, focusing a substantial portion of the project work and timeline up front on the data architecture, ETL, and integration efforts. Having accomplished these tasks early set the stage for a very rapid and successful series of agile development sprints leading up to the build for the first release of Salesforce.com to this financial services firm's newest business unit.

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### **The Results**

While the project is still ongoing, all data work has been successfully completed, with several million records loaded into the new Salesforce.com system and integration points established using a combination of Informatica PowerCenter and Informatica on Demand. As of this writing, the project is just four business days away from development code freeze, leading into QA and UAT phases prior to production deployment, which remains on schedule to meet the client's desired go-live date. Both Integra and our client are pleased with the progress made to date, and we are moving forward without interruption toward subsequent releases for the client's other business units even as we complete the final tasks of this first release.



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