



**HAPPY TO COMPLY
WITH YOUR REQUEST**

Case Study



Building data pipelines for bulk data migration to salesforce.

Project Objective



- ✓ Onboard home loan and insurance company to Salesforce CRM platform
- ✓ Migrate bulk data of various objects related to account, contacts, insurance, claims, and loans to Salesforce CRM cloud platform
- ✓ Ensure the data migration is accurate and complete
- ✓ Integrate Salesforce CRM with the company's existing systems

Client Challenges

Siloed data

The company had data scattered across different systems or departments, making it hard to access and share.

ETL Complexity

Managing Extract, Transform, Load (ETL) processes was complex, as the company lacks in-house expertise in handling these processes

Maintenance and Monitoring

ETL pipelines and data integrations required ongoing maintenance and monitoring to ensure they keep working smoothly.

Resource Constraints

The company had limited resources, including skilled staff and technical infrastructure, which made it challenging to manage the onboarding and meeting timelines effectively.

Scope



**Data
migration**

Integration

**Data Quality
Reports**

**Pre & Post
Migration
Plans**

**ETL jobs
Logs & Stats
Management**

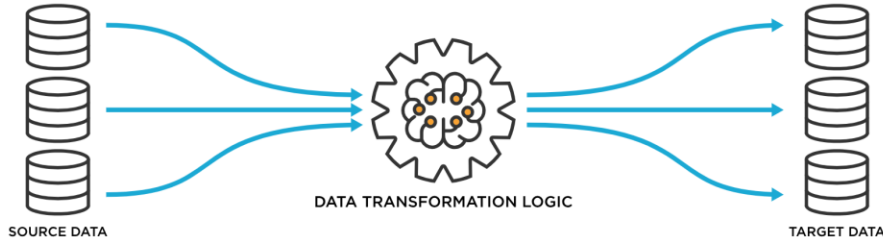
**Project
Management**

Data Migration



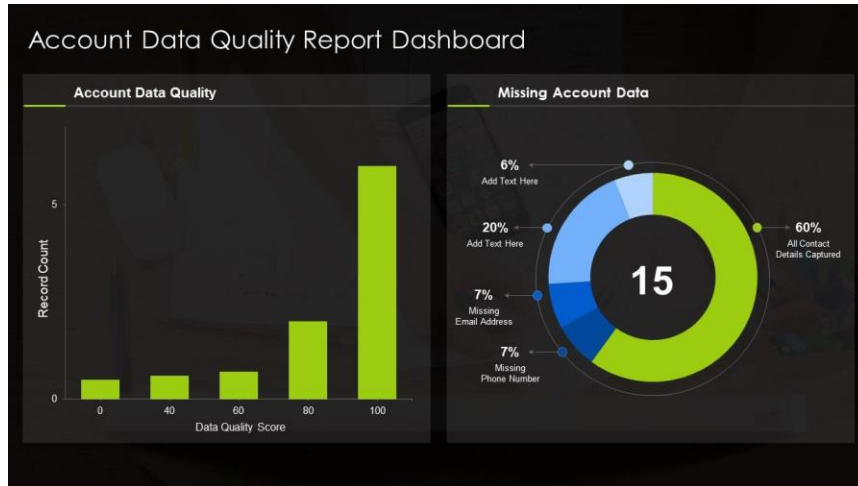
- ✓ Identified and document the source systems where the client's data resides.
- ✓ Understood the data structure, data types, and relationships in the source systems.
- ✓ Analyzed the data to determine its quality and consistency.
- ✓ Understood Salesforce CRM environment by analyzing custom objects, fields, and relationships to accommodate the incoming data.
- ✓ Ensured that the necessary Salesforce licenses and permissions are in place for data migration activities.
- ✓ Created a detailed mapping document that defines how data from the source systems will be mapped to the corresponding fields in Salesforce.
- ✓ STM documents accounts for data transformations and business rules that need to be applied during migration.
- ✓ Developed ETL processes to extract data from the source systems using Talend Data Integration.

Data Integration



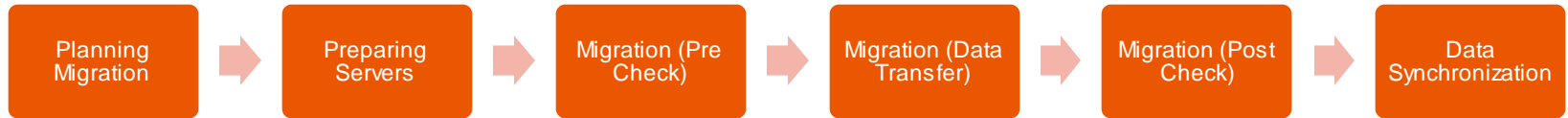
- ✓ Developed ETL Jobs in Talend to extract data from legacy system.
- ✓ Cleansed and transformed data to ensure consistency, accuracy, and quality.
- ✓ Performed end-to-end testing to ensure that the data integration process works seamlessly.
- ✓ Ensured that the client's data was synchronized across all of their systems, which improved efficiency and reduced errors.
- ✓ Conduct thorough data validation to ensure that the data in Salesforce matches the source system. Developed test cases and validated the data against them.

Data Quality Reports



- ✓ Implemented data quality reporting mechanisms to assess and maintain the accuracy and completeness of the migrated data, provided the client with insights to identify and address any potential issues.
- ✓ Conducted data profiling to identify data anomalies, inconsistencies, and potential issues.
- ✓ Established data standards and enforced them. Ensured that data is entered consistently, following predefined formats and guidelines.
- ✓ Implemented automated data validation processes that run in the background. These processes identify and flag data issues in real-time, making users aware of errors immediately.

Pre & Post Migration Plans



- ✓ Developed detailed plans for both pre-migration and post-migration activities. These plans included data integration, testing, and validation before migration, as well as activities to ensure data consistency and quality after migration.
- ✓ Document all data integration processes, including data mapping, transformation rules, and any issues encountered during the migration.
- ✓ Established data governance policies and procedures to maintain data quality and consistency in the long term.
- ✓ Ensured that all stakeholders review and sign off on the data integration and migration process to mark the completion of the project.

ETL Jobs Logs & Stats Mangement



- ✓ Implemented logging mechanisms within ETL jobs to track their execution status and any errors.
- ✓ Stored these logs in DB for easy access and analysis.
- ✓ Set up monitoring and alerting mechanisms to notify team about issues with ETL jobs in real-time.
- ✓ Created reports and dashboards to visualize ETL job performance and trends.

Project Management



Activities

- ✓ Ensured that the project was executed efficiently, meeting deadlines, and staying within budget.
- ✓ This included coordinating activities, managing resources, and addressing any challenges that emerged during the project.
- ✓ These solutions collectively facilitated a successful transition to Salesforce CRM for the client's company, ensuring data accuracy, efficiency, and cost-effectiveness in the migration process, while also enhancing the overall integration and management of data across systems.

Roles Required



- Data migration team
- Data Analyst
- Project Manager
- Business Analyst
- Database Administrator
- Development Team



THANK YOU