

# Salesforce Org Mergers

---

WHAT THE EXPERTS WISH THEY KNEW  
BEFORE THEY STARTED



# Contents

- 3 Introduction
- 4 **Alex Dunner - WordPress VIP**  
Understanding legacy systems and the value of a partner
- 6 **Meg Lovell - Everbridge**  
It's all about timing – expect the unexpected
- 8 **Rob Josey - Bell Canada**  
Embrace the agile approach, be firm with best practices, and ask for the funding you need
- 10 Key Takeaways

# Introduction

We're not going to sugarcoat it. Merging Salesforce orgs is hard.

It takes time, money, and significant effort to streamline operations from multiple Salesforce orgs into a single surviving org. However, if you can do it well, then the benefits for your organization can be profound.

In this resource, Greg Poirier, the Founder and CEO of CloudKettle, speaks to three industry leaders about their experience with Salesforce, as they share candidly about their experience in planning and executing multiple org mergers.

So before you merge...



WORDPRESS VIP

# Alex Dunner

*Alex is the Head of Marketing Operations at WordPress VIP. He is a MarTech junkie with a knack for managing Marketing Operations. With a wealth of experience across various marketing automation platforms, Alex is passionate about identifying trends that fuel the sales/marketing funnel and creating the processes that keep systems aligned.*



## The Challenge

In his role at WPVIP, Alex was brought into a major org merge which required folding a newly acquired company's org into a long-existing org. To guarantee the success of the project, Alex and his team worked tirelessly in advance to ensure that they knew where they had been, so they could plan out where they wanted to go.

# Understanding legacy systems and the value of a partner

**In the case of an org merger, how did you decide which org would merge into which?**

In our case, the decision was based on a few things:

1. The size of the orgs/the number of sellers and individuals who had access to the orgs
2. The complexity of the orgs
3. The training/retraining requirements

We ultimately chose to keep the larger org with the more advanced features, and fold the smaller org into that one. The processes were more clearly defined within the larger org, and it was agreed that it would be more effective to train the smaller group of new users on these existing processes.

**What did the internal process look like to prepare for an org merge?**

We did our homework before the project officially kicked off. We needed to understand what was happening in each org, especially as it pertained to the core teams that would be impacted. We interviewed people to understand current workflows and spent time assessing and evaluating actual workflows vs desired workflows. We wanted the migration team down the road to be able to have a clear reference point for how things work (e.g. how CS tracks customers) and be able to rely on these interviews and documents as an accurate starting point.

### What do you wish had gone differently?

Early communications could have been better. Towards the end of the project, it became clear that there were gaps in documentation and a lot of fixes and work-arounds. In retrospect, front-loading requirements and securing documentation and resources could have gone better.

We also could have focused more on before-and-after change management and having front-end visibility from an executive level. This is so key to the success of a project, so keeping that closer to the front of mind during the entire process would have been beneficial.

### What aspect of your org merge were you happiest with?

I'm very happy with the Internal interviews that were carried out. These interviews laid the groundwork and allowed the team to understand where to go for answers and who to rely on for good internal workflows that they can then replicate for the rest of the team. It was a lot of work, but it was needed and saved a lot of headaches long term.

### How aggressive should you be in allowing an org to preserve their current method of operations vs forcing them into how things are done in the new org?

Unless there's a reason to keep processes separate, I wouldn't recommend it because you're just building technical debt you have to deal with down the road. "Throw things out before you pack the boxes." Get rid of the processes that aren't working so you don't waste time merging or combining things that are no longer useful or effective.

### What would be your top piece of advice for an organization preparing for an org merger?

*Get a partner to help you. Even if you have a defined sales ops team, working with someone who has a history of doing this and a repeatable successful process is very valuable.*

Also, make sure that you remain organized. Having a centralized place where everyone has access to all assets and this is very helpful to get everyone up to speed as quickly as possible.



EVERBRIDGE

# Meg Lovell

*Meg is the Senior Director of Business Transformation at Everbridge. She specializes in leading teams and facilitating communication across all stakeholders including Development, Operation, Sales and Clients. Meg is passionate about defining metrics of success, and her superior project management and data investigation skills make her an asset to any team.*



## The Challenge

Everbridge is a large organization and had acquired several companies with their own Salesforce instances. In this case, two newly acquired companies needed to be merged into the surviving parent org.

# It's all about timing – expect the unexpected

## How did you come to the decisions to merge orgs?

There are always many factors to consider when dealing with an org merger, but in our case the decision was primarily financial – to save the cost of a redundant Salesforce org. However, getting the book of business into the same reporting process was also a major driver – we wanted to be able to capture data in a consistent way on the platform, instead of having things fragmented across multiple silos.

## What was your biggest pain point pre-merge?

At the highest levels of org – one of the major pain points was the inability to provide the full 360° visibility to Sales Leadership and Executives. With multiple orgs, we had team members requiring access to both instances and experiencing major losses of efficiency when dealing with multiple orgs and fragmented reporting. Having a dual system was a major business disruption and also created challenges when it came to cross-selling.

## Fix or migrate? How do you decide?

For us, the decisions were influenced by time constraints – which is a reality in any business. If we were to migrate into a brand new system, it would be 18 months+ before we saw any value. All resources would be focused on that platform. Whereas if we made a decision to improve the existing system, we could start delivering incremental enhancements to the organization and experiencing quicker wins. As a function of value over time, that greatly exceeds what it would have been if we started a new org from scratch.

## What would be your top piece of advice for an organization preparing for an org merger?

*Being able to plan at least a year in advance is to your advantage. Harmonize data definitions in advance, taking into consideration appropriate lead time. Rationalize business processes between the two orgs pre-migration and ensure that the org is a level-up.*

Also, realize that migrations create a significant change for your users to adapt to. Incentivize them by providing improvements to the user experience.



## What did you do in retrospect that was brilliant?

Having legacy business system owners involved in the original project was key. They identified a number of the pitfalls that we may have otherwise missed. Having a meeting of the minds with all important stakeholders, including old and new orgs, was an incredibly important part of the success of the project.

## What advice would you give to someone about to embark on the merge process?

Identify and actively work with the people responsible for business processes at the earliest possible stage. If an aspect of the business will be majorly impacted by the merger, then the owners of those different processes should be an important part of the overall Salesforce migration from day one. Do not make assumptions about how peoples' systems are running and what their data looks like without having them actively involved.

Also, make sure that data mapping is high on the list of critical to-dos. Data mapping should not only move towards the new system, but also happen in reverse. Map both directions. This will help you identify where you might run into trouble.

## If you could do one thing differently...

If I could do something differently – ensure you are working on realistic timelines, not arbitrary deadlines. Plan for the unexpected. Even with the best PMs and situations – there will be things that come up that take things off the rails. Expect the unexpected.

BELL CANADA

## Rob Josey

*Rob is the Senior Manager, Cloud - Salesforce at Bell Canada. An experienced senior sales team leader and builder turned Sales Ops and Salesforce Strategy owner, Rob has worked in the Telecom industry for the majority of his career and uses Salesforce to deliver best in class projects to support sales and operations teams. Rob and his team recently won the 2022 Best in Class Marketing Award for their innovative efforts using Salesforce to reach a broader customer base and increase overall sales.*



### The Challenge

The organization had a series of disparate Salesforce Sales Cloud instances with overlapping use cases but not a sufficiently resourced team to maintain them. The decreased cost of ownership and maintenance was appealing, and ultimately the decision was made to merge orgs. However, this came with several complications, including moving new functionality into a larger org, and training a new group of users.

## Embrace the agile approach, be firm with best practices, and ask for the funding you need

### Did you ever consider starting from scratch and building a new org?

That approach wouldn't have made sense for us, as the orgs that were merging had very different processes, the surviving org was much larger. So much customization existed in the parent org already, starting from scratch would have been prohibitive.

I look at a Salesforce org as something that requires continuous improvement. There are always things to fine-tune, optimize, eliminate, etc. Once the org merger is done, then you spend time doing technical debt cleanup. If you do lift-and-shift as a phase one and then process optimization as a phase two, this approach allows you to get an

MVP out the door and then invest time in making improvements and changes. While a brand new org can sound tempting, ultimately, that solution becomes untenable when you're talking about existing orgs of significant size and complexity.

### Who funded the migration? Where did the money come from?

This can be a difficult discussion, and there are different ways to set this up, but ultimately, if your team is servicing a new group or headcount, then that is something they should be funding. In this case, the money came from the budget of the business group being merged over.



### **How long did the merger take and what were the important components?**

In my experience, the length of the merger will depend on complexity. Is it lift-and-shift? Or are you designing a new process? Lift-and-shift with standard objects and not overly complex processes would be six months to a year. It will rely heavily on who you're working with and keeping scope creep under control. Stick to a better process (agile sprint method) and do demos along the way. If there is scope creep, then it's usually scope creep in the right direction, but it should still be accounted for. Involving key stakeholders the entire way is key to success, but you need to keep people in check to keep scope creep manageable.

### **Was there an ongoing maintenance cost benefit? How have you secured funding on an ongoing basis as a result of mergers?**

My approach was to be as direct and upfront as possible. If my team is taking care of a new group of users, there needs to be funding involved. My team does not have unlimited resources. Funding received is typically put towards an SI (Systems Integrator/Salesforce Partner), and depending on the complexity of the support needed, the internal team will handle it, or if it's too complex, it would be assigned to the SI to help.

When the decision is made to merge an org, I strongly advise Ops leaders to demand an ongoing budget allotment as a result. Review the complexity of the org to determine the value of the support and then review each fiscal year to see if the budget needs to be adjusted. Consider upcoming projects and note that if major changes are required, then that needs to be factored into the overall investment.

### **What did you do in retrospect that was brilliant?**

Add in more buffer than you think you need. Every project takes longer than you'll realize.

### **What was the biggest mistake you made that you'd never do again?**

*I would say the biggest mistake was taking a waterfall project approach. We developed for about six months, completed a demo, and then had to rip a large portion up. Whereas if we had been doing the agile approach, we would have been more efficient with our time.*

### **If you could go back to yourself in that year, what advice would you give?**

Do this as an agile project. Spend more time building the project requirements through user stories.

### **How aggressive are you/should you be on allowing an org to preserve their current method of operations vs forcing them into how things are done in the new org?**

Be aggressive in moving people forward toward best practices and use the objects Salesforce has out of the box. Augment standard objects to meet your needs and don't build custom objects that replicate standard objects.

# Key Takeaways

All of our experts have had very different experiences with org mergers over the years, but across all of the interviews, a few consistent themes emerged from their advice:



Do not take the decision to merge lightly.

It is a BIG undertaking.



An org merger will take longer than you think.



Take an agile approach.

Do demos. Be involved in the progress every step of the way.



Do the legwork before you start.

Take the time to thoroughly understand the existing orgs and processes. Talk to stakeholders. Determine existing pain points. Doing this work in advance will give you the best chance of success.



Secure the funds.



## About CloudKettle

CloudKettle helps enterprises drive revenue with the Salesforce and Google ecosystems. We do this by providing the strategy and hands-on keyboard execution to leverage platforms like Salesforce Sales Cloud, Marketing Cloud, Einstein, and CRM Analytics to create highly personalized cross-channel experiences that drive revenue.

As your strategic advisor, we help by enhancing your people, processes, and technology to build a roadmap centered around scalable tactics and security.



To learn more, contact us at:

hello@cloudkettle.com | [cloudkettle.com](https://cloudkettle.com) | 1-800-878-4756 ext. 202