

Industry

- Healthcare
- Software

Project Outcomes

- Unified Sales Cloud
- Scalability for future acquisitions

Solution Features

- Sales Cloud org merge
- Data migration
- Heroku connector integration



About AppCentrica

We've built our Salesforce practice one customer at a time based on quality and strong relationships. We deliver proven solutions for:

- Sales Cloud + CPQ
- Service Cloud + FSL
- Einstein Analytics
- Community Cloud
- MuleSoft
- Pardot
- B2B Commerce
- Heroku & Custom Lightning Development

About RLDatix

Since its founding in 1997 RLDatix has been on a mission to change healthcare. The company offers a suite of cloud-based software solutions that enable organizations to reduce healthcare-acquired infections, report on adverse events, and ensure patient safety. With over 3,000 customers in 19 countries, RLDatix software protects hundreds of millions of patients.

Challenge

RL Solutions and Datix, two companies of similar size, merged to form RLDatix. Both RL and Datix had their own operational Sales Cloud. Management had determined that in order to best support common global business processes they would need to consolidate the two Salesforce instances.

This was a considerable challenge as each instance leveraged different solution sets, customization and configurations. Ultimately, it was decided the RL instance should remain active as its sales strategy and integration set was more mature. However, the Datix instance could not be fully decommissioned as it was leveraging FinancialForce for some mission critical processes.

Solution

AppCentrica ran a series of workshops gathering requirements from key stakeholder from both RL Solutions and Datix and built out a data migration strategy. A thorough deduplication practice was applied to ensure there would be no data redundancy in the unified instance.

Additionally, field and object standardization were considered at all levels to ensure users from both teams could operate efficiently in the new instance, and could more easily adopt it. Finally, AppCentrica built out an interface using a Heroku solution to keep the Datix instance connected – thereby preserving FinancialForce data visibility.

Outcomes

The data migration provided a single application landscape which has enabled a consistent global sales strategy. Management can now easily report on a unified sales pipeline, forecast more accurately, and have a more holistic view of customer accounts. Individual reps have a singular standardized instance to work out of, minimizing confusion and fostering greater collaboration between previously isolated teams.

In addition, data standardization has created an environment which can more easily integrate with other systems and will be more conducive for future acquisitions.

Finally, the Heroku solution has ensured that financial processes need not change which is critical for preserving the backbone of the organization at large. Overall, the merge was very successful and has preserved all integral data from both instances.



"While we have been using Salesforce for many years at RL Solutions we sought out an experienced partner to help us with a complex org merger and Heroku Connect integration when we merged with a UK-based company and became RLDatix. I cannot stress enough how capable the AppCentrica team was - not only in providing architectural direction but in delivering on a huge amount of work in a short time period. Thank you, Donna, Pavan, Medardo and Gaurav for your outstanding effort."



Brian Cohen

Director, Corporate Information Systems, RLDatix