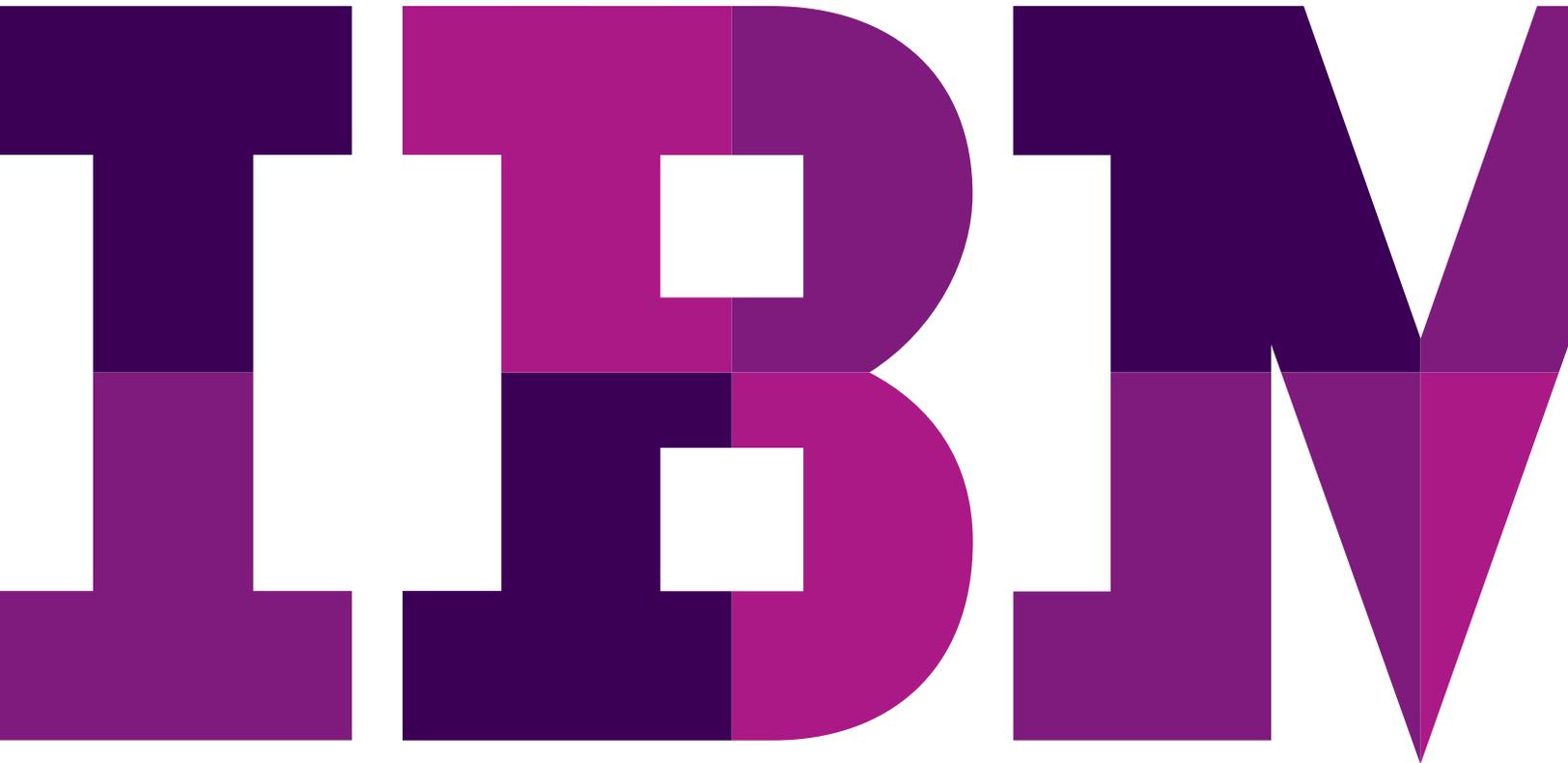


# From legacy CRM platform to customer-activated enterprise

*Taking a multi-phased approach to Siebel migrations with IBM and Salesforce*



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*The customer-activated enterprise:*

- *Has a vision for how it creates loyal customers and designs interactions and experiences to delight at every touch point.*
  - *Leverages data and analytics to understand and serve customers as individuals... in context.*
  - *Operates with agility to constantly understand and react to market changes quickly and efficiently.*
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## Introduction

The advent of cloud computing has radically transformed the landscape of enterprise business systems. Organizations, while eager to explore this paradigm, can get held back by their data trapped in highly customized, on-premise CRM systems like Siebel. Over the years these systems can become difficult to maintain. In many cases they may not be suited to providing the agile, social and mobile environment that the lines of business require. But, replacing them can also be costly and time consuming. Organizations are left wondering what to do. Cloud-based platforms can allow for more rapid innovation such as the deployment of omnichannel (social, mobile, Communities, etc.) capabilities compared to on premise platforms.

For many organizations, the answer is to transform their legacy customer relationship management (CRM) applications— from on-premise environments to cloud-based CRM solutions. These solutions can enable a rapid pace of innovation and responsiveness to customers, employees and partners. We call this transitioning to the customer-activated enterprise.

In an era of abundant connectivity, plentiful information, and ubiquitous digitization, the new economic equation favors transparency. In search of innovation, more than half of CxOs expect to open up their enterprises—bringing down barriers to extend collaboration inside and outside. Their most radical shift may be a new view on what it means to collaborate with customers. CEOs consider technology the single most important external force shaping their organizations. Other CxOs also see it as one of the top three factors. The members of the C-suite are likewise united in believing that an entirely new set of dynamics is emerging. Customers, patients and citizens expect to be treated as individuals, which means knowing what makes each of us “tick”: our history, values, beliefs, habits and quirks. They also expect their banks, retailers, healthcare providers, etc. to be agile, interactive, social and mobile. That, in turn, requires much closer collaboration between organizations and the people they serve.

Most CxOs recognize that what applies to customers and citizens applies to employees and partners, too. They envisage that organizational boundaries will become far more porous, enabling greater collaboration with employees and partners to accelerate innovation. They also anticipate sourcing more of that innovation from outside. Where once an enterprise could go it alone, and be successful doing so, it must now collaborate.<sup>1</sup>

The focus of this white paper is to provide options for organizations already considering a migration from their Siebel CRM systems. The paper offers information to help gain an understanding and approach to ease and demystify the migration from Siebel legacy CRM platforms to a cloud-based CRM platform like Salesforce, on your journey to become a customer-activated enterprise. In doing so, the paper examines a multi-phase approach to a CRM transformation and provides insights into lessons learned and best practices for the transformation.

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#### Typical Siebel CRM challenges can include:

- Ongoing support investments, including licensing fees
  - Added complexity from years of extensive customization
  - Long enhancement delays
  - Need for highly skilled, costly resources
  - Lack of social, mobile capabilities
  - Lack of user adoption, usability or productivity issues
  - Lack of future product direction to meet evolving needs of the customer-activated enterprise
  - Inability to innovate
- 

Today, organizations want to provide a true omnichannel (mobile, social, communities, etc.) digital experience, including self-service to their customers. When evaluating CRM platforms, organizations will want to choose a platform that can keep up with the pace of innovation. An integrated customer success platform like Salesforce can provide an ecosystem of solutions and capabilities that allow organizations to do today what their competitors plan to do in the future. A forward-thinking platform can enable industries and companies of virtually all sizes to connect to their customers in a whole new way using the latest innovations in cloud, social, mobile and data science technologies.

#### Why Salesforce

The landscape of CRM solutions has matured and converged as a result of merger and acquisition activities. These vendors offer solutions replete with features and functions. Every vendor can just about tick all the boxes from a requirements perspective. CRM leaders must understand the core focus areas and value proposition of each vendor to make the right buying choices.

Salesforce provides an integrated customer success platform, with an ecosystem of solutions and capabilities that are consistently and seamlessly expanded and improved—with frequent upgrades with a focus on improving user experience

With these capabilities, customers no longer need to keep building complex logic that can slow down pace of innovation. They can provide today what others plan to do in the future.

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### Salesforce key features

The Salesforce Customer Success Platform has become a leading enterprise cloud ecosystem, enabling industries and companies of all sizes to help connect to their customers in a whole new way using the latest innovations in cloud, social, mobile and data science technologies. Salesforce provides integrated cloud solutions such as marketing, sales and service clouds, which can enable a 360 degree view of the customer.

- A market leader and bellwether platform for cloud and mobile customer success solutions
- Fast to deliver business value by deploying in an omnichannel ecosystem
- Born in the cloud, committed to the cloud, only offered in the cloud
- Solutions includes sales, service, marketing, partner and employee communities, social collaboration, analytics and development platform
- Help improve sales and qualified leads
- Better retain customers at a reduced costs
- Leverage out-of-the-box social collaboration: Mobile, chatter communities — customer, employee and partners
- Help increase sales rep efficiency

Perhaps most important, Salesforce provides out-of-the-box integration capabilities that can be implemented to ‘front end’ your Siebel environment and provide an agile CRM layer for a more secure, social and mobile digital experience to your customers, partners and employees.

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### The multi-phased approach

If your current CRM platform has a complex deployment with many integration points, changing or replacing it can be daunting. Legacy applications can be tightly integrated with downstream systems, with customized business process workflows and associated custom business logic. Depending on scope, the level of customization and the complexity of integration, there are essentially two primary options companies may want consider.

- *Replace and sunset*—This “Big Bang” approach replaces current business processes modeled in one CRM platform with similar functionality on another. This approach must be considered very carefully, as the risks can often outweigh the benefits. There can be legal considerations of data retention. There can also be significant change management that must be handled within the organization.
- *Transitional coexistence*—In this approach, a multi-phased engagement gradually replaces legacy Siebel platform functionality with Salesforce. This hybrid co-existence approach works well when an outright replacement would take more time or energy than is optimal for your objectives.

We recommend adopting an iterative approach with the aim of Salesforce becoming your system of engagement and Siebel the system of record. Businesses will typically see this change as an opportunity to improve their business processes. There would be far less benefits of moving to cloud if it involved duplicating business process, data and security models of legacy CRM system.

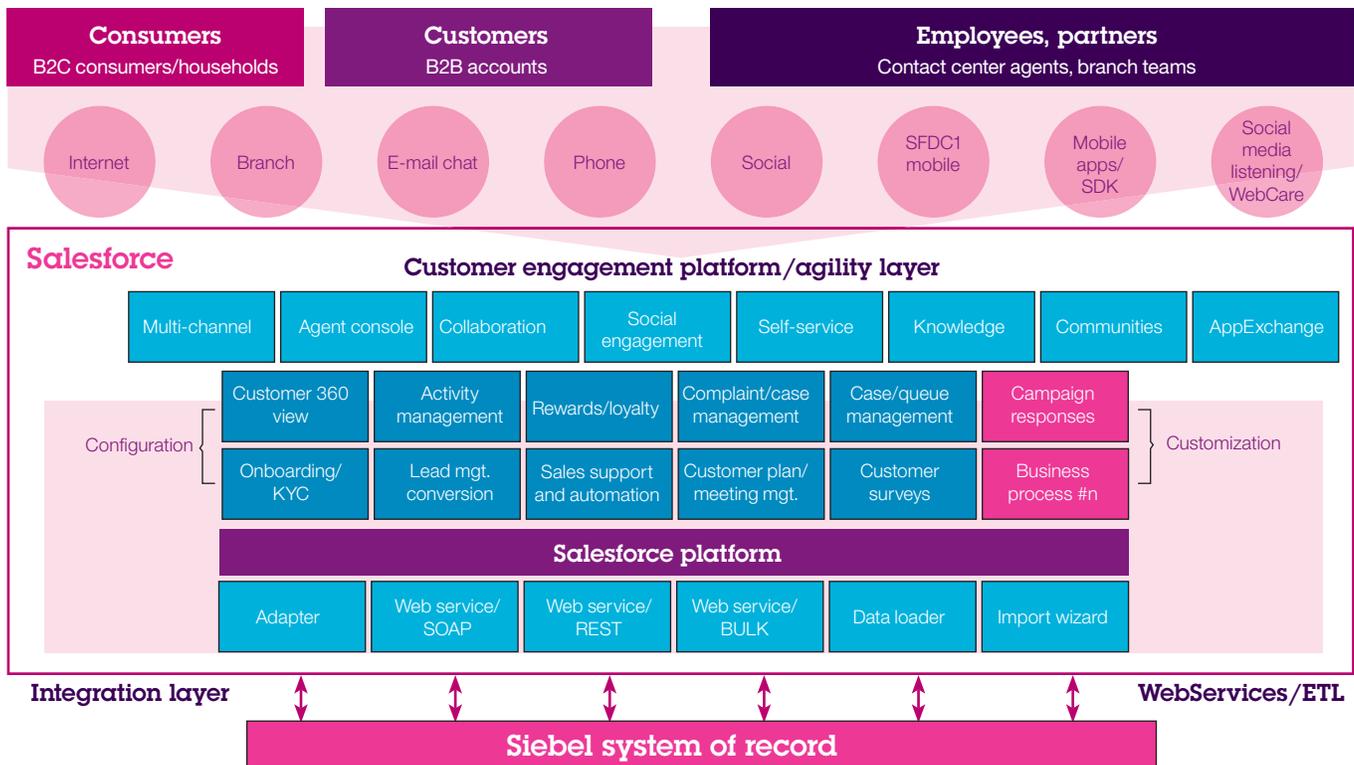


Figure 1: A multi-phased approach to Siebel migrations.

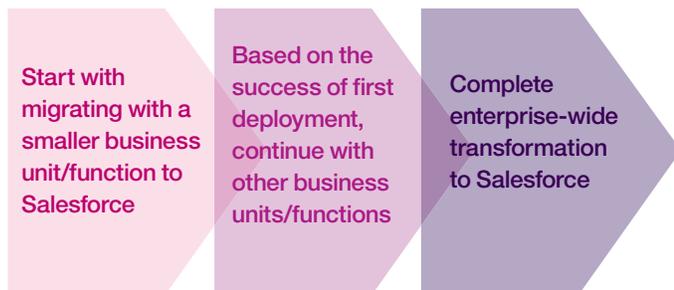
Based on experience, a “Big Bang” approach should be considered only if you have identified solid business reasons and compelling events for selecting this approach. Adopting an iterative approach can provide compelling benefits, including the ability to:

- Reduce costs significantly by shrinking support requirements, training costs and avoiding expensive upgrades

- Improve business processes and the user experience by solving long-standing challenges around user adoption and effectiveness
- Implement best of breed capabilities including, mobile, communities, and third-party integrations while keeping complex back office capabilities in Siebel
- Support greater business continuity during the transformation

## Getting started with migration

Start the transformation by identifying a pilot business unit or department which has lower risks and business impacts. The strategy here is making Salesforce the “System of Engagement” for your employees, partners and customers, while Siebel remains the “System of Record” for some data entities, at least until the process they support can be migrated to Salesforce. It is critical to define a solid master data management strategy. Needless to say, a transformation of this magnitude requires professional Organizational Change Management.



Based on the success of this phase, you can review business processes and integration needs and start expanding to other business units and functions with an eventual goal of retiring the Siebel platform over a period of time. The length of the co-existence period will be determined and vary by the level of customization of your existing landscape. Some industries like communications and banking typically benefit from a longer co-existence period. Customer and or consumer engagement processes across the various communication channels can be readily enriched and enabled in the Salesforce platform, thereby maximizing the investments in any highly configured processes in Siebel.

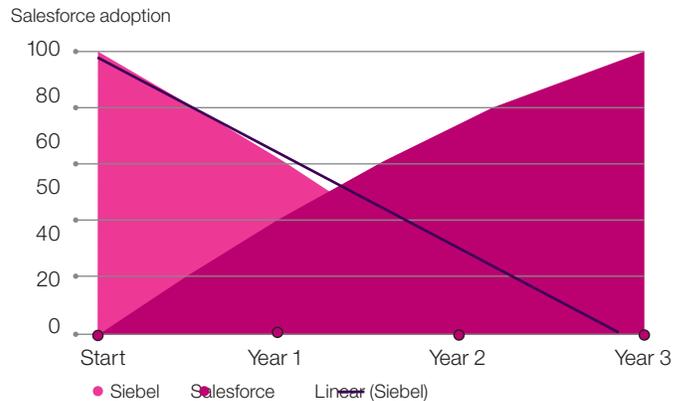


Figure 2: CRM modernization timeline.

Following the co-existence approach allows for a more gradual enablement of functionality in the Salesforce platform while facilitating greater business continuity during the transformation.

During the transformation, there are a number of considerations you will want to keep in mind.

### Processes and business logic

- How will you migrate business logic such as scripts, triggers, workflows, assignment manager rules?
- How will you migrate on-premise solutions that are specialized, domain- or market-specific vertical solutions? Migration of these solutions may warrant significant operations and processes re-engineering hence it is very critical to involve business stakeholders from the beginning.

### Analytics and reporting

- What will you do with reports and dashboards?

**People**

- What will the impact be for your end users, admins, configurator, partners, etc.?
- What training and cross-training will you provide to the project and support team and how often?
- How often will you seek feedback from the users and stakeholders?

**Security**

- What level of access control for business services exists and how will you maintain it?
- Do you have sensitive personal information (SPI) to migrate and how do you handle the risks and manage compliance?

**Data**

- What data will you migrate and how will you identify the extraction criteria?
- What is the quality of your data and how to recover from errors in bulk loading?
- How will you map entities? The Siebel Data Model (party model) for B2B and B2C Account hierarchies and households are different from Salesforce. The data migration effort is underestimated due to assumption of one-to-one mapping of entities. Accurate mapping of sales/customer territories and their structure.

**Data visibility**

- How to plan to handle data visibility within divisions, organization, responsibilities, positions, etc.?

**Integration**

- Do you need to integrate at the same frequency or method? What is the master data management strategy?

**Siebel to Salesforce implementation best practices**

- Think of business transformation and leverage Salesforce mobile, collaboration and analytics. Do not approach it with technical migration mindset but take this opportunity to optimize business processes.
- Leverage current business and technology realities. Use this opportunity to optimize your technical integrations. Do you really need all the data that used to power old CRM system? Is there a way to optimize the data requirements?
- Leverage out of box features as much as possible and avoid huge customization.
- Implement in stages, sales, collaboration, service, communities etc. Start rolling out by champion users, take feedback and implement changes before rolling out to all users.
- Build a Master Data Management Strategy, which is critical for coexistence of Salesforce and Siebel.
- Change Management is very critical. Workshops and training can help you plan and execute it well. It is critical for users to understand the reason and benefits associated with the change.
- Prepare and provide extensive documentation and training material to the end user.
- Seek frequent feedbacks from the users and stakeholders and act on it.
- Review your strategies periodically and calibrate or adjust if and when necessary.
- (Over) communicate!
- Monitor data quality and avoid “data decay” at all cost. Your system is as good as the data it has.
- Avoid “single point of failure” both in terms of system and people. Cross train project and support teams at every possible opportunity.

### Siebel to Salesforce implementation steps

The Salesforce Professional Services 10 step plan may be condensed into the following phases and components. During the engagement phase, IBM can work with you to customize this plan to your business goals and priorities.

**Planning**—Plan, Plan, plan—get stakeholder sponsorship and commitment, Change Management, improve business process, KPI, goals.

An important lesson is to not consider a Siebel to Salesforce project as a technical migration – it is not! It really is a business transformation, enabling you to truly get closer to your customers, partners, consumers etc. while becoming a “customer activated enterprise.”

**Execution**—Execute as per your plan, governance, design Salesforce UI, integration requirements, and Master Data Management.

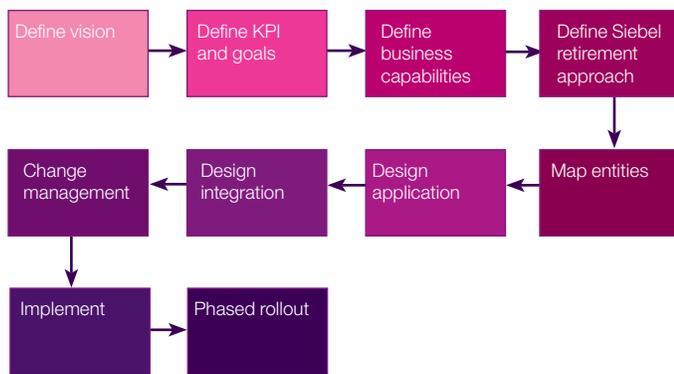


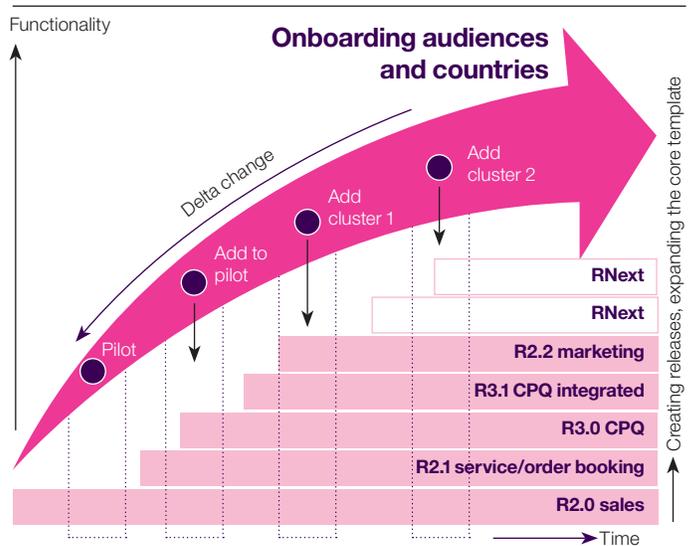
Figure 3: Salesforce Services high level plan describing the key activities to consider for a successful transformation.

**Rollout**—Change Management—Train and on-board end users, implement in an iterative “wave based” approach and roll out in a phased manner starting with pilot users expanding it by business capability, department or geography.

Figure 3 shows the Salesforce Services 10 step plan describing the key activities to consider for a successful transformation.

When zooming in on defining business capabilities, IBM brings a strong migration accelerator in the form of industry specific component business models (CBMs). A CBM enables you to rapidly focus on differentiating processes to help facilitate a competitive market position. For other processes a Salesforce.com out of the box may suffice, resulting in an accelerated migration program while delivering business advantage.

For those organizations operating across borders, we have included an example of IBM’s rollout approach shown in Figure 4.



**Release planning and onboarding principles:**

- Cluster 1 consists of new audiences and countries as well as solving the delta for Pilot country
- Cluster 2 consists of new audiences and countries as well as solving deltas for Pilot country and Cluster 1 countries

Figure 4: An example of IBM’s rollout approach.

### Why IBM?

IBM can help you along virtually every step of your journey in your multi-phase CRM transformation. IBM brings unique insight and innovation.

- IBM is a leader in Worldwide CRM Services, Business Consulting, Cloud Professional Services, and Thought Leadership.
- IBM has unique insight and extensive Siebel skills built up over many years.
- Pool of dual skilled subject matter experts in both Salesforce and Siebel.

- IBM is a Platinum partner of Salesforce.
- IBM is a leader in data migration and integration space with many solutions like Websphere, Data Stage, Cast Iron, etc.
- IBM is a leader in organizational change management based on a systematic approach to change that is focused on outcomes and closely aligned with formal Agile Project Management methodology. Figure 6 shows an example of the tangible outcomes of this approach to change.
- The IBM Agile Change Method focuses on strategic execution, people change and value realization of transformation initiatives.

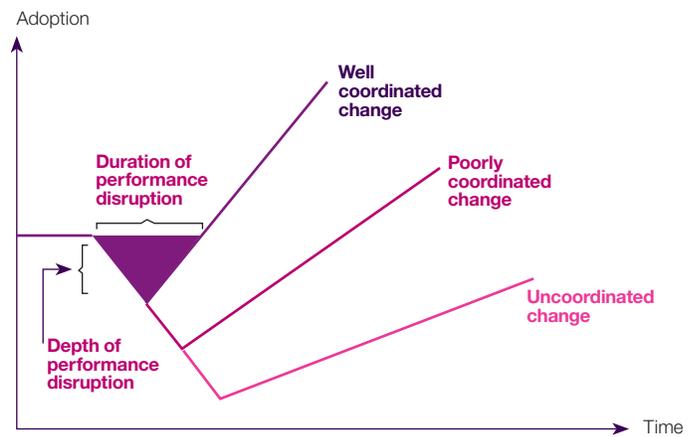


Figure 5: Change management is key to user adoption.

Last but not least IBM Siebel to Salesforce Data Migration accelerators are designed to help you reduce overall data migration efforts considerably, which can reduce risk and improve data quality. When zooming in on defining business

capabilities, an industry-specific CBM enables you to rapidly focus on differentiating processes giving you a competitive market position.

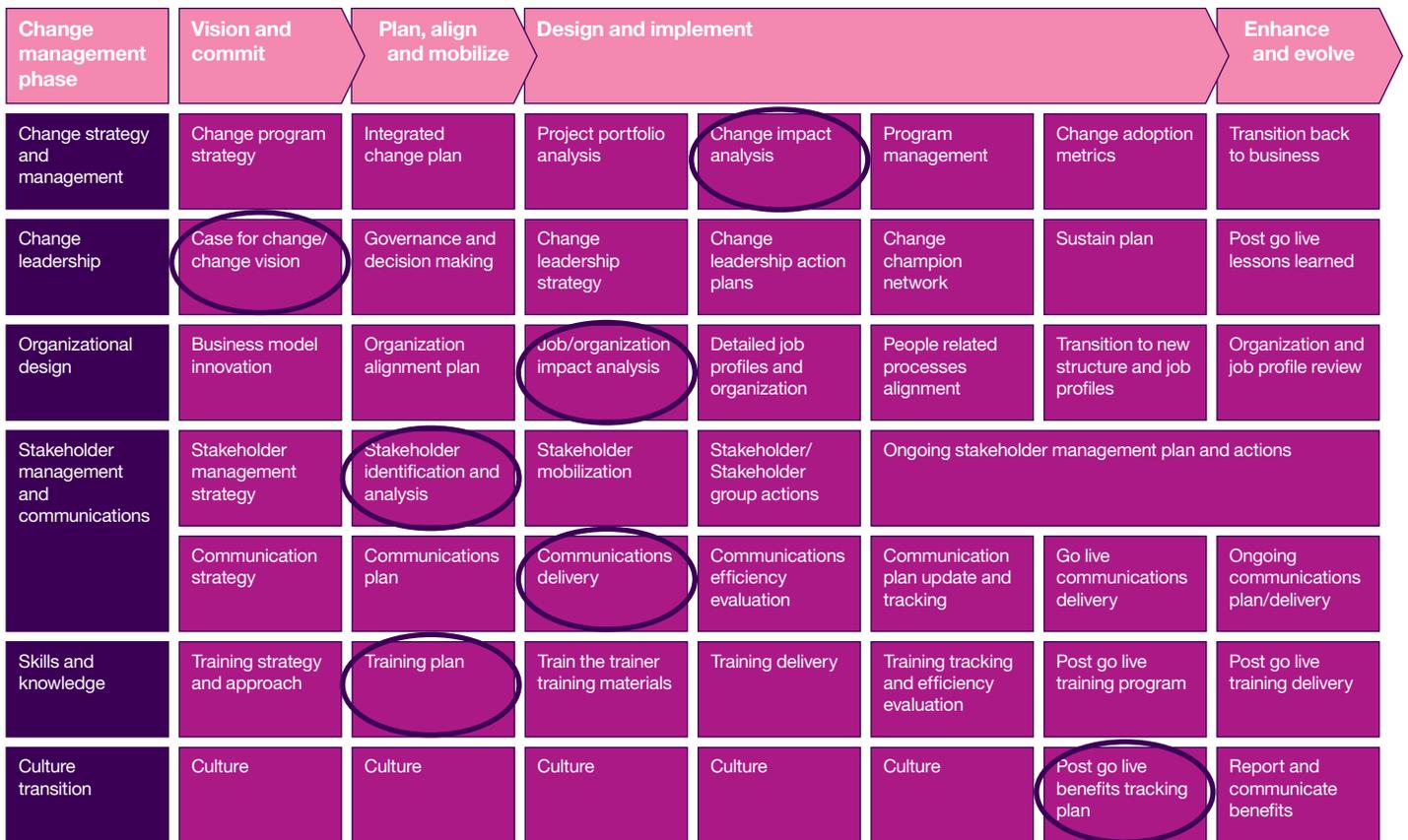


Figure 6: IBM organizational change management overview.

IBM can help you along virtually every step of the way in your digital transformation journey. Your journey may start with your current Siebel environment, providing tools and accelerators to help speed the journey as “time is the new currency.” When transforming your current Siebel landscape,

IBM design thinking can help you focus on the customer and omnichannel innovation. A next-generation customer engagement platform such as Salesforce can help you drive business benefits.

## For more information

To learn more about the ways IBM can help you with your Salesforce CRM transformation journey, please contact:

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1 IBM Institute for Business Value, “The Customer-Activated Enterprise: Insights from the Global C-Suite Study,” October 2013.



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