Salesforce Integration

• **Powerful**
  - On-premise to SFDC, Cloud to SFDC
  - Bi-directional synchronization
  - Data Migration

• **Flexible**
  - Standards-based connectivity
  - Quickly adapt to API updates

• **Easy**
  - Business Analyst/SFDC Admin
  - Fully graphical, Point-n-Click
Migration vs. Integration

“One-off” Migration

Migrate and Deprecate:
– Moves legacy data to salesforce.com
– Cease to use the legacy application.
– Common when migrating from Act, Goldmine or other CRMs where required functionality is entirely supported by salesforce.com.

“Ongoing” Integration

Migrate and Synchronize:
– Pre-populate salesforce.com with legacy data
– Other parts of the business continue using the legacy applications for different functionality.
– salesforce.com CRM is continuously updated using automated synchronization.
Data Migration Challenge

The Myth:
Data Migration is linear and done one time.

- Legacy data can be migrated once and you’re done.
- Salesforce Data Loader is sufficient for a one-time load of final CSV data.
- All other processes must be manual or scripted.
- IT and developer resources will be required for extended timeframes.
Data Migration Challenge

The Reality:

Data Migration is Iterative!

- You will return to earlier phases
- System requirements and configurations will change during the process.
- Cleansing will reveal new issues and require new extracts & transformations.
Migration Case

Real World Migration:
A Leading Energy Company moved 5 million records from Factor Informix DB-based Call Center/Billing System to Salesforce

1. Inaccurate Data
   • Inaccurate assumptions on row-ID rules

2. Non-conforming Data
   • Format of customer addresses were incorrect.

3. Failed Test
   • Salesforce objects changed after loading = missing data on test.
The Problem

- Reliance on developers and data analysts to create and modify scripts.
- Time and expenses rack up quickly.
- Data Loader adds no value to the most important phases of the process.
- Data Loader processes data serially, making every iteration that much slower and more expensive.
The Solution: Jitterbit Data Migration

**Software**
- Jitterbit Enterprise software with Data Migration enhancements
- Graphical, no coding
- Designed for the Technical Business Analyst/Salesforce Admin

**Services**
- Hands-on certified implementation support
- Jitterbit “Iterative Migration” Methodology & Best Practices
- Domain experts and time-tested solutions for migration pitfalls
- Final testing, validation and review included
The Jitterbit Migration Difference

• Complete every step of a migration with a single product
  – No “Bait and Switch” into expensive platforms or appliances.
  – Never upgrade to another system – Jitterbit handles it all.

• Deep functionality within a single user interface
  – Never leave the UI to write scripts.
  – Workflow rules, Cleansing, Validation is all included.

• Jitterbit is a heavy duty migration tool
  – Alternatives are Data Loader imitations or watered-down hooks
  – Complete migrations 6x faster – no limits on records

• Simple & cost-effective for the Business Analyst/SFDC Admin
  – One system designed for use by a single resource
  – No need to rely on IT to implement/manage $50k platforms/appliances or write scripts
Advantages of Jitterbit Migration

• **Software**
  - **Extraction.** Native connectivity for any system to Salesforce.
  - **Transformation.** Map any source data directly to Salesforce.
  - **Cleansing.** Built-in functions & conditions in a single process.
  - **Speed.** Parallel processing for 6x performance boost.
  - **Reusability.** Flip the switch for bi-directional synchronization.

• **Services**
  - **Promote** Jitterbit “Iterative Migration” Methodology.
  - **Provide** a framework for promoting consistent best practices.
  - **Build** meaningful data migration expertise within an organization.
  - **Leverage** knowledge as an asset across projects to ensure success.
Real World Results

### Leading Energy Company

<table>
<thead>
<tr>
<th>Objects</th>
<th>Data Loader</th>
<th>Jitterbit</th>
<th>Gain</th>
</tr>
</thead>
<tbody>
<tr>
<td>130,000 Accounts</td>
<td>252 Minutes</td>
<td>43 Minutes</td>
<td>5.8x</td>
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</tbody>
</table>

### Fortune 15 Healthcare Company

<table>
<thead>
<tr>
<th>Objects</th>
<th>Data Loader</th>
<th>Jitterbit</th>
<th>Gain</th>
</tr>
</thead>
<tbody>
<tr>
<td>850,000 Custom</td>
<td>971 Minutes</td>
<td>162 Minutes</td>
<td>6x</td>
</tr>
</tbody>
</table>
Summary

Key Benefits

• Complete migration projects in a fraction of the time
• Easily convert a one-time migration into a bi-directional synchronization
• Jitterbit is the easiest, fastest, most complete offering available for Salesforce migrations
Learn More

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