

# Consolidating Multiple Salesforce Orgs: A Best Practice Guide

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## Meeting the Salesforce.com Multi-Org Challenge

Whether you talk about “SaaS silos” or “multiple versions of the truth,” separate instances of Salesforce—or any cloud application, for that matter—can result in an inconsistent and often incomplete picture of interactions with customers. This can mean missing potential cross-sell or upsell opportunities or duplicating efforts when attempting to sell to or service the same customer. Customer interactions originating from different parts of your organization can cause too-frequent contacts, which can be an issue for your marketing, and perhaps your legal, department. Finally, and maybe most importantly, when planning where your business needs to be, sales-wise or in terms of resource allocation, you must compile, consolidate, and analyze data related to successes and failures.

To deliver a single view of relevant and trustworthy information to end users, a salesforce.com CRM or Force.com implementation must be connected to the rest of the enterprise. However, even though a lack of cloud integration is generally acknowledged as one of the primary barriers to adopting software as a service (SaaS) applications, many salesforce.com customers have multiple, disconnected instances, or orgs (organizations), of Salesforce. How does this happen? What is the impact? And how do you ensure that Salesforce users can access the right customer data at the right time across disparate Salesforce environments?

This white paper provides an overview of the different approaches to addressing the multi-org challenge posed by Salesforce, as well as a discussion of how the Informatica Cloud® master data management (MDM) solution can maximize end-user adoption and return on investment.

### Multiple Salesforce Orgs: Who Has Them and Why?

Salesforce documentation defines an org as:

“A deployment of Salesforce with a defined set of licensed users. An organization/org is the virtual space provided to an individual customer of salesforce.com. Your organization includes all of your data and applications, and is separate from all other organizations.”

There are many reasons why your business may be implementing and maintaining multiple Salesforce orgs. While businesses operate and grow differently, multiple Salesforce orgs are most commonly found in those that have experienced rapid growth through mergers and acquisitions or that sell multiple products and go to market with different sales—and marketing—teams. Most recently, with a growing number of marketing, service, and sales cloud options, businesses have been inclined to adopt separate orgs for each of their units.

Regardless of whether your business deployed multiple Salesforce orgs by accident or by design, the question remains: How do you avoid data silos and gain the global visibility required to accelerate performance while maximizing your investment in Salesforce?

## Informatica Cloud MDM: The Right Choice for Salesforce.com Customers

To tackle the issues that affect how you interact with customers, you need a solution that can scale to accommodate growth. Informatica Cloud MDM makes it possible to choose how to share data among Salesforce orgs, while maintaining its integrity and following data governance best practices.

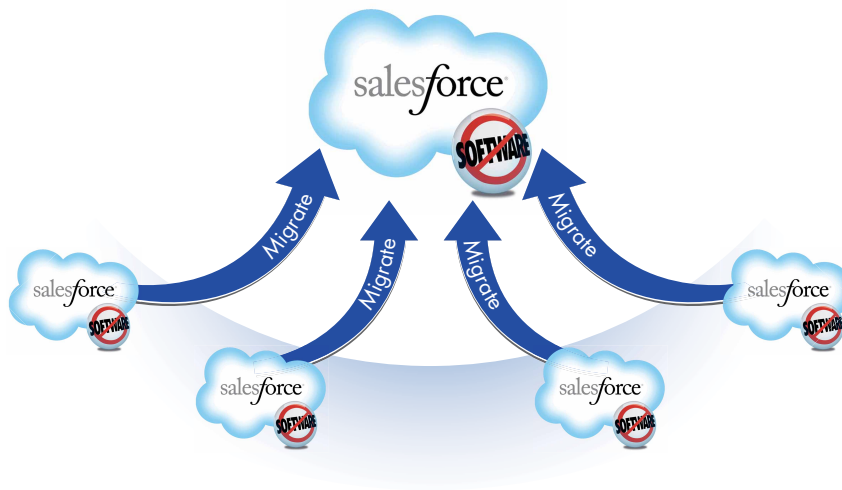
Depending on how your business operates, you may want to eliminate multiple orgs and maintain a single consolidated one. On the other hand, if your concerns involve reporting, you can choose a global reporting org without impacting existing orgs. Or, you can maintain a clear master or flagship org that belongs to your parent company. If you choose the third approach, you benefit from the ability to master your data in one environment and also from maintaining the other orgs as separate entities. The Informatica Cloud suite of solutions is effective in these efforts, regardless of the path you choose.

### Option 1 – A Single, Consolidated Org

Here, all orgs are replaced with a single instance of Salesforce. This process involves retiring multiple orgs by migrating data to a single one.

Pros	Cons
<ul style="list-style-type: none"><li>• Establishes a single business process</li><li>• Provides a single/global view of the customer</li><li>• Enables central administration and maintenance</li><li>• Reduces costs over the long term</li><li>• Reduces overhead by eliminating the need for an administrator for each org</li></ul>	<ul style="list-style-type: none"><li>• Potentially loses track of a brand or legacy product that has been migrated to the single org</li><li>• Reaches the limitations of the org sooner</li><li>• Potentially eliminates the need for an administrator of a retired org</li></ul>

## SINGLE ORG CONSOLIDATION



### Establishing a Single-Org Consolidation with Informatica Cloud MDM

The following steps enable the creation of a single, consolidated Salesforce org. Each step occurs in the cloud and after initial setup runs automatically, requiring minimal skills to maintain.

**Step 1: Migration** – Informatica Cloud Integration makes it easy to map data and run transformations to ensure data matching to the final org. Bidirectional synchronization allows all orgs to be used during migration. Informatica Cloud Integration provides a broad array of cloud and on-premise connectivity, handles millions of rows of data, and runs tasks that include the migration of data to all Salesforce objects that appear in the org, including custom objects—all while tracking errors.

**Step 2: Standardization** – Informatica Cloud MDM is a native Force.com application that ensures all data is standardized to create a single view of your reference data.

**Step 3: Deduplication** – Informatica Cloud MDM ensures that duplicates are matched and tracked before they enter the org. As a result, only unique records populate the new org.

**Step 4: Consolidation** – All records are consolidated to create a single view, and an audit is retained for future reference. At the field level, it is also possible to choose the fields from each org that will populate the master record.

**Step 5: Reporting** – This step ensures global reporting via rolled-up hierarchies.

## Option 2 – Global Reporting Org

Here, a global reporting hub that imports—or inserts and updates (upserts)—high-level data from each Salesforce org for analytical purposes is created. The process entails purchasing an independent Salesforce org, synchronizing it with existing Salesforce orgs, and consolidating the data in the global hub. All corporate reports and dashboards are run from the new org. This is the least invasive approach and enables a single view of your data without impacting existing Salesforce environments.



Pros	Cons
<ul style="list-style-type: none"> <li>• Establishes a single view of the customer without invasive changes to existing orgs</li> <li>• Builds an exclusive reporting environment</li> <li>• Transfers cleansed data to source orgs</li> </ul>	<ul style="list-style-type: none"> <li>• Places a single record in the global hub only, so customers can still be emailed from other orgs</li> <li>• Potentially allows dirty data to enter source orgs</li> <li>• Adds to overhead costs through the purchase of an additional org</li> </ul>

## Establishing a Global Reporting Salesforce Org with Informatica Cloud MDM

The following steps enable the creation of a global reporting Salesforce org. Each step occurs in the cloud and after initial setup runs automatically, requiring minimal skills to maintain.

**Step 1:** Upsert – With Informatica Cloud data integration, data is migrated onto the reporting hub and synchronized with operating Salesforce orgs to ensure that reports are up to date.

**Step 2:** Standardization – Informatica Cloud MDM is a native Force.com application that ensures all data is standardized to create a single view of your reference data.

**Step 3:** Deduplication – Informatica Cloud MDM ensures that duplicates are matched and tracked before they enter the org. As a result, only unique records populate the new org.

**Step 4:** Consolidation – All records are consolidated to create a single view, and an audit is retained for future reference. At the field level, it is also possible to choose the fields from each org that will populate the master record.

**Step 5:** Reporting – This step ensures global reporting via rolled-up hierarchies.



# Option 3 – Master Salesforce Org Synchronization

Here, a parent-and-child org is created and assigned to an existing Salesforce org which acts as the master environment. This option is ideal for a hierarchical business in which the primary business unit maintains financial and business processes and subsidiaries report to it. Master Salesforce org synchronization does not require purchasing another Salesforce org. However, depending on the orgs in place, you may need to expand data storage or upgrade your edition of salesforce.com.



Pros	Cons
<ul style="list-style-type: none"> <li>• Creates a single point of reference for processes</li> <li>• Establishes a master environment that operates as the master record</li> <li>• Offers a less-invasive approach to creating a single view of the customer</li> <li>• Returns clean data to subsidiary orgs</li> </ul>	<ul style="list-style-type: none"> <li>• Allows multiple records to exist and, therefore, multiple variations</li> <li>• Requires that multiple processes be maintained for each org</li> <li>• Requires integration overhead to be managed for a successful data synchronization</li> </ul>

## Establishing a Master Salesforce Org Synchronization with Informatica Cloud MDM

The following steps enable a master Salesforce org synchronization. Each step occurs in the cloud and after initial setup runs automatically, requiring minimal skills to maintain.

**Step 1:** Standardization – Because an existing org becomes the master org, this step creates a clean foundation for future data matching. The Informatica Cloud MDM solution ensures that data is standardized to create a single view of reference data.

**Step 2:** Deduplication – Informatica Cloud MDM ensures that duplicates are matched and tracked before they enter the org. As a result, only unique records populate the new org.

**Step 3:** Master Data Sync – Data is migrated from subsidiary orgs and synchronized with the master org. Approvals can also be synchronized, thereby automating opportunity-to-order processes.

**Step 4:** Consolidation – All records are consolidated to create a single view, and an audit is retained for future reference. At the field level, it is also possible to choose the fields from each org that will populate the master record.

**Step 5:** Reporting – This step ensures global reporting via rolled-up hierarchies.

## Conclusion

There are many options for meeting the challenges posed by multiple instances of Salesforce and managing the valuable asset that is your data. If reporting is key, then the global reporting org could be the right choice. If a unified brand and a single business process are important to success, then we recommend establishing a single consolidated org. As we've noted in this white paper, the Informatica suite of cloud data management products—Informatica Cloud MDM and Informatica Cloud Integration—supports a variety of approaches and provides you with the flexibility to adjust them to suit your needs and preferences.

To get started with Informatica Cloud MDM for Salesforce, please visit [www.InformaticaCloud.com/MDM](http://www.InformaticaCloud.com/MDM).

## About Informatica

Informatica Corporation (NASDAQ: INFA) is the world's number one independent provider of data integration software. Organizations around the world rely on Informatica for maximizing return on data to drive their top business imperatives. Worldwide, over 4,630 enterprises depend on Informatica to fully leverage their information assets residing on-premise, in the Cloud and across social networks.



Worldwide Headquarters, 100 Cardinal Way, Redwood City, CA 94063, USA Phone: 650.385.5000 Fax: 650.385.5500  
Toll-free in the US: 1.800.653.3871 [informatica.com](http://informatica.com) [linkedin.com/company/informatica](https://www.linkedin.com/company/informatica) [twitter.com/InformaticaCorp](https://twitter.com/InformaticaCorp)

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