fusionSPAN
Bridging Gaps Through Technology

Data Migration

ETL Steps

Data Mapping

The intermediate database has pre-configured field mapping to Salesforce. We will update the mapping to include any client specific custom fields and objects. This helps identify

- Missing fields in the new system
- Missing or mismatched data
- Picklist value mapping

Intermediate Database

We set up an intermediate data lake in AWS (preferably in the clients AWS instance for data security). This database has a well defined schema and will allow for loading all needed data into Salesforce.

Data Extraction (Client Task)

Client to extract the data from the old system(s) into the intermediate database, including some transformations to match the schema provided.

Data Quality Validation

Validation of data can help identify data quality issues, duplicates, formatting and inconsistencies.

Load Sample Data

We load sample data in Salesforce Sandbox and then walk the client through it to get approval and sign off.

Data Load (UAT)

Once there is sign off on the sample data, we perform a full load into the Salesforce Sandbox environment. Once everything looks good, we target the ETL process to the production instance.

Data Load (Production)

We perform the first cycle of full data load into Production and tweak the process till the data looks correct in Production.

The data loading script is deployed in the client's cloud environment. This way data never leaves the client's environment and is loaded directly into Salesforce.

Data Audit Report

We create an audit report to ensure all data that was intended to be migrated has been populated in Salesforce.
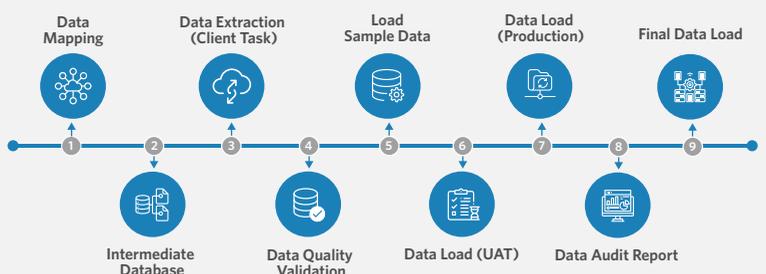
Final Data Load

A final load is performed before go-live. This will capture any updates from when the first cycle of data load was performed.

Benefits of this process

There are some key benefits to our process.

- Our ETL tools are designed to handle high volumes of data
- Using an ETL process reduces loading errors
- Complex transformations can be done through an automated, repeatable process
- Data quality is improved with the fusionSpan process
- We use Salesforce Bulk API to minimize API calls

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