

## Consolidation Process Overview

This is a sample of some of the steps involved in consolidating Salesforce Orgs. Some of these steps are simple and quick to implement, while others may take significant effort.

Just a reminder that an org consolidation effort is **not** a technology project, it's a business project. Don't underestimate the impact to the business of combining orgs.

Definition of a Unit of Work – Activities, data collection, data presentation for a single actor and a single system with in and out connections. A UOW should be Independent, Purposeful, and Measured

Example: Present an application to a person, collect and validate the data, and pass it along to be processed.

Example: Grabbing a quote, passing it to the customer, waiting for their signature or a reason for rejection, and passing it along. Both of these can be implemented many ways and the implementation doesn't impact the overall business process or model.

The Goals are to find Units of Work (with a connection to Salesforce):

- That are common and can be implemented in a single platform without impacting other Units of work.
- That need to be reconciled before a single version can be implemented.
- That are difficult to implement in a common platform and evaluate.

Step 1: Build Business Unit Functional Map

- Define Business Unit key functions and order in value chains (the sequence of functions that generate revenue).
- Define Business Unit key functions that reference Salesforce that are NOT in a value chain (staff training, gamification support, Project Portfolio management, etc.).

Step 2: Business Process Maps (Break down a Business Unit function - focus only on tangible business functions in value chains)

- Defines the activities that occur in order (clear start and end)
- Add the people performing or are impacted by the activity
- Add the results of the activity
- Add events that can occur along the way (this include triggers and delays)
- Add the business rules that constrain, change, or remove the activities, actors, results, and events.
- Add information collected, created, modified, or exchanged.
- Identify automation that's in place today.

Step 3: Break process map down into Units of Work. The goal is to define Units of Work:

- that are similar among teams that can be consolidated.
- that are isolated and can be implemented in a common system without impact to other UOWs.
- that are isolated and can NOT be implemented in a common system.

Step 4: Build system architecture diagram (determine where Units of Work should be implemented)

Step 5: Build application architecture (how Units of Work are implemented)

- Build as-is and to-be diagrams

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- Build transition plan with Business
- Determine process validation and recovery plans

### Step 6: Release and Deployment Management

- Build deployment plan
  - What are the big steps?
  - How does this impact business operations?
  - How are the changes tested and vetted?
  - Reporting needs?

### Step 7: Org Structuring

- Build technology transition approach/implementation plan
- Build test plan
- Reconfiguration (merge the environments)
- Code collapse (merge the code base)
- Rework interfaces
- Data migration / consolidation