M&A Salesforce Orgs Consolidation

Harmonize Your Salesforce Orgs, Teams, and Processes for Greater Efficiency

The Business Challenge

Merging Salesforce Orgs involves overcoming challenges such as retiring legacy systems and implementing cloud-based solutions. It also requires addressing outdated data and metadata cleanup while optimizing license costs. Post mergers and acquisitions, organizations also need to streamline and automate manual processes and integrate disparate data sources to ensure a cohesive and efficient Salesforce environment.

The Solution

M&A Org Consolidation solutions by Jade Global provide a comprehensive approach to merging your Salesforce Orgs, focusing on both functional and technical aspects. We begin with a detailed assessment, comparing and contrasting your existing Salesforce Orgs and reviewing licenses. We analyze your processes, data, and metadata to offer a complete view of your Salesforce landscape. Our solution includes strategies for app retention or retirement, integration touchpoints, and data migration while ensuring data quality and optimizing license costs to streamline and enhance your Salesforce environment efficiently.

Jade's M&A Salesforce Orgs Consolidation Strategy

System Security
Understand your IT security policies and ensure compliance within Salesforce.

Salesforce Metadata
Consolidate metadata from your Orgs into a single source of truth.

User Access
Manage your user access and capabilities by department and role.

Business Processes
Streamline your workflows and processes across organizations.

Data Quality
Use predefined procedures to merge your data for consistency.

License & Costs
Audit your licenses and features to maximize ROI.

Compliance
Ensure your data meets industry compliance and regulatory standards.

M&A Salesforce Orgs Consolidation: Jade's Offerings

Pre-merger- Analysis & Due Diligence

- As- Is V/S To-Be State
- Source Vs. Target Salesforce Org Analysis
- User Groups & Security Model Identification
- Surviving Vs Merged Business Processes Analysis
- Metadata & Data Analysis & Migration
- Appexchange Products Strategy
- Integration Strategy
- Reports & Dashboards
- Qa Strategy & Release Planning

Merger- Implementation

- Project Management
- Functional Design & Technical Architecture
- Dev Sprints
- (Re)Configure Business Processes
- Appexchange Packages
- Architecture Setup & Build Integrations
- Qa Testing (Sit & Uat)
- Deploy, Release & User Training

Post Merger - Support and Enhancements

- Project & Change Management Plan
- Monitor
- Implementation & Future Road Map
- Ongoing Support And Enhancements
- Implement Managed Services

Benefits to Your Business

- Lower licensing and operational costs
- Streamlined and standardized processes
- Accurate, single-source data

- Unified user experience
- Enhanced security and compliance
- Optimized use of Salesforce features

Why Choose Jade Global?

Jade Global is a growth enabler for fast-growing enterprises of the 21st Century and a long-standing Salesforce partner for a decade, specializing in Strategy, Implementation, Integration, and Managed Services.

950+	350+	18+	100+	400+	~4.9/5
Certifications	**Associates**	**Prebuilt Solutions & Accelerators**	**Clients**	**Projects**	**CSAT Rating with Salesforce**

With the highest quality standards, including CMMI® Maturity Level 5, ISO 27001, HIPAA compliance, and a rich partner ecosystem, Jade Global is the ideal IT services partner to support your entire IT stack.

Connect with our experts to see how our M&A Org Consolidation Solutions can streamline the unification of your Salesforce Orgs, teams, and processes.

Talk to Our Experts →