We've Got You Covered

The 10-Step Journey from Siebel to Salesforce

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INTRODUCTION

We get it. You're an Enterprise account that made a massive investment in Siebel years ago. You've learned all about different CRM solutions, but you've delayed making any decision, or have invested only departmentally in Salesforce. There's a lot to consider with big ramifications: accepting a sunk cost, a trepidation that costly customizations won't be adaptable, and a fear of retraining employees and partners.

But there's also a bigger problem at hand with the status quo – low adoption, expensive and time-consuming upgrades with no measurable value to your business, and a realization that little innovation is coming from Siebel.

Never before has Salesforce had more to offer, and the time is right to finally get a jump-start on your best future.

Our most successful customers have implemented Salesforce either coexisting with or completely replacing Siebel. And it's never been so smooth.

WHY YOU SHOULD DO THIS

Before we get into a roadmap, let's review why transitioning from Siebel to Salesforce is a great idea.

1 USABILITY

Salesforce is a multichannel, browser-based agent with a contextual component framework. And the new Lightning Experience makes it even easier to use and learn than ever. Siebel, however, has poor usability due to disconnected systems and siloed customer data.

2 RELIABILITY

Salesforce has an almost 100% availability rate with a simple point-and-click configuration, while Siebel has a lack of real-time insights with unreliable and varied uptimes.

3 SCALABILITY

Salesforce utilizes a multitenant cloud architecture on a single metadata-driven platform, giving customers automatic upgrades with no cost or downtime. Siebel is a different story: painful, expensive upgrades and customizations; lack of mobile, social, and other modern channels for sales and service; and limited insights for up-selling and cross-selling.

4 TRUST

More than 150,000 companies of all sizes across the globe trust Salesforce. They trust us with their business and it's our top priority to deliver customer success through solutions with excellence in system availability, performance, and security.

But you knew all of that. So let's start with best practices and a methodology to get you on your way.

BEST PRACTICES TO CONSIDER WHEN RETIRING LEGACY SYSTEMS

DO NOT APPROACH THIS AS A TECHNICAL MIGRATION

Key tenets of a successful CRM transformation apply (vision, metrics, governance, roadmap, process, adoption, technology).

LEVERAGE A SIMPLIFIED DATA MODEL WITH SFDC

Start with SFDC's core CRM data model and expand it based on business needs.

NO "LIKE FOR LIKE" IMPLEMENTATION

Identify where user experience is critical and map it to SFDC user interface. Identify and address pain points.

AVOID "OVER ENGINEERING"

Many Siebel implementations are heavily customized, avoid rebuilding.

MOBILE FIRST/FEED FIRST

Mobile devices as well as social feeds become the dominating working pattern of tomorrow.

COEXIST AS AN OPTION

Consider temporary coexistence of SFDC and Siebel to de-risk complex migrations.

STEP 1

DEFINE YOUR VISION

Before you begin your migration, you'll need to understand the current state of your business and where you're heading so you can implement with a definitive plan in mind.

Here are some items you should solve before getting started:

- Identify and understand your key audiences
- Define and shape optimal solutions
- Articulate your clear and tangible vision
- Develop a roadmap for the future

STEP 2

DEFINE YOUR KPI's AND GOALS

Here are the common KPIs and goals that we see in the business and that are most important to any customer-first organization:

HAVE A 360-DEGREE VIEW

Go from transaction view to lifecycle and engagement view. Utilize a single view across all channels and the customer lifecycle. Then augment it with info from other core systems, history, and past interactions.

ENGAGEMENT AND SIMPLIFIED EXPERIENCE

Make sales and customer service seamless and effortless across channels and devices, with necessary business process integration and collaboration. This requires proactive engagement, support, and predictive engagements. Use Customer Journeys to strengthen communication for greater customer success and cost reduction.

SELF-SERVICE AND MOBILITY

Help people help themselves in areas relevant to their work and tasks by connecting and collaborating with other sales reps, service agents, and customers. You'll need to enable mobile-based service and support.

PRODUCTIVITY AND OPTIMIZATION

Empower reps to effortlessly access information from core systems in real time. Data-driven analysis and insights will drive more engagement and better experiences.

STEP 3

DEFINE YOUR CAPABILITIES

To bring your CRM vision to life you'll need to define a capabilities framework. Start with foundational capabilities like:

- Account Management
- Account Hierarchy
- Contact Management
- Customer Profile
- Security

You will also need capabilities to support your foundational Sales, Service and/or Marketing functions. For Sales, consider the following:

- Lead Management
- Campaign Management
- Opportunity Management
- Products & Pricing
- Asset Management
- Quoting etc.

You may also want to introduce advanced capabilities such as Customer Service, Predictive Intelligence, and Asset Based Ordering. Specific needs for different verticals should also be mapped out now too.

To create your 360 degree customer view, Salesforce provides robust Reports and Dashboard capabilities in addition to multiple ways to integrate with your backend systems and BI tools.

STEP 4

DEFINE YOUR SIEBEL RETIREMENT APPROACH

The Siebel retirement approach requires phases. One or more phases may be needed based on the requirements and capabilities needed by your business.

Your current CRM landscape might look like this, with these existing capabilities implemented in Siebel in some shape or form:

FOUNDATION CUSTOMER MANAGEMENT

- Account Management
- Account Hierarchy
- Customer Profile
- Contact Management
- Security

SALES

- Leads Management
- Campaign Management
- Opportunity Management
- Pricing
- Products
- Asset Management
- Quoting

STEP 4 (CONTINUED)

DEFINE YOUR SIEBEL RETIREMENT APPROACH

SERVICE

- Case Management
- Activity Management
- Automation
- Escalation Management
- Knowledge Management

SERVICE – ADVANCED

- Service Contracts
- Entitlements
- SLA Management
- Call Scripts

THE FOLLOWING CAPABILITIES ARE AVAILABLE ON THE SALESFORCE PLATFORM, BUT NOT OFFERED BY YOUR CURRENT CRM SOLUTION:

- Automation
- Agent Dashboard
- Social Customer Service
- Customer Engagement
- Partner Engagement
- Employee Engagement
- Mobile App
- Next Best Offer
- Suggest Expert
- Similar Cases

FIRST PHASE | MOVE CUSTOMER MANAGEMENT AND BUILD SECURITY

1. Build sales process into Salesforce.
2. If there is Outbound Calling for Sales, then that channel will also need to be established in Salesforce in phase one, such as CTI/voice, outbound email, and so on.
3. There will be an integration needed to Siebel or MDM to sync master data (Accounts and Contacts).
4. Quoting can be done in Salesforce and synced with Siebel at the header level, and the rest of the order process can happen in Siebel.
5. You can develop a canvas app to CPQ process in Salesforce so agents don't have to access two systems and the transformation is transparent to them. It increases their efficiency and gives them a better experience.

SECOND PHASE | BUILD CUSTOMER SERVICE

1. Hook up channels to Salesforce.
2. Build omni-channel experience for your customers.
3. Enhance customer view so your agents can best support them, and cross-sell and upsell.
4. Bring in automation so service agents can concentrate on customer service rather than documentation.

STEP 4 (CONTINUED)

DEFINE YOUR SIEBEL RETIREMENT APPROACH

5. Build world-class knowledge to support your agents and eventually expose it to your customers in a Customer Community or on your website. Send the same message through every channel a customer engages with you.

THIRD PHASE | INTRODUCE ADVANCED SERVICE

1. Measure SLAs internally even if you are not bound by contractual agreements with your customer to make sure you are providing good customer experience using SLA management.
2. Add call scripts using Visual Workflows to increase agent efficiency.
3. Build additional reports and dashboards to measure your performance.

FOURTH PHASE | INTRODUCE CPQ CAPABILITY

1. Use an AppExchange CPQ partner to deliver seamless pricing and quoting into your sales process and unlock the full impact of Salesforce on your business. Note: You'll retire Siebel after delivering this phase and start recognizing complete value out of your Salesforce investment.
2. Introduce social customer service and a Customer Community for increased customer engagement, which leads to increasing customer loyalty to your brand.

FIFTH PHASE | IMPLEMENT PARTNER COMMUNITY

1. Bring your partners into your Salesforce ecosystem by engaging with them in a new way.
2. Introduce a mobile app for your business.
3. Make use of the predictive intelligence feature delivered by Service Cloud to make your customer service agents more productive and deliver effortless experience to your customers. It will help our agents resolve cases faster and suggest relevant offers to customers.
4. Deliver additional channels so your customers can connect from anywhere on any device.

SIXTH PHASE | INTRODUCE EMPLOYEE COMMUNITY

1. Engage and connect with your employees.
2. Happy employees equal happy customers.

STEP 5

MAP YOUR ENTITIES

Salesforce provides comparable and more advanced features with a more robust architecture using the model-view-controller model, easier, and reduces time to roll out new features. It provides all the best of modern technology to configure or customize your application.

The following highlights the big differences between Salesforce and Siebel:

	salesforce	SIEBEL eSALES • eMARKETING • eSERVICE
USER INTERFACE	Provides tabs, page layouts, record types, and Visualforce	Only has screens, views, and applets
BUSINESS LOGIC	Delivers workflow, triggers, validation rules, assignment rules, approval, and Apex	Uses workflow, EAI, and virtual objects
DATA MODEL	Uses Business Objects, Custom Objects, Junction Objects & Fields. You also can use Salesforce Connect to get data from your backend systems into SF	Uses Business Objects, Business Components, Integration Objects, Fields and Joins and Virtual Objects
SECURITY	Provides you and your team with profile, role hierarchy, sharing rules, and Apex sharing	Siebel delivers security through organization, position, and responsibility
LANGUAGE	Uses Apex and JavaScript	Coded in eScript and Visual Basic

STEP 6

DESIGN YOUR APPLICATION

The migration of Salesforce from Siebel provides you with the opportunity to rethink your process

It gives you a chance to set up process aligning to how your business should operate in toady's modern world. It gives you a chance to apply best practices and simplify your processes.

In fact, we recommend that you re-evaluate your data system.

Your first step is take a bottom up approach. Define your Data model with Standard Objects, Custom Objects, fields, relationships, Integrations and your security using Profiled, Role Hierarchy and SSN, all with point and click.

Then move on to the Business layer. You can use tools like Validation Rules, Workflows, Visual Workflows, Assignment Manager, Time Based Workflows, Entitlement Process & Milestones etc.

Once that's achieved and aligned, you should design a CRM model and workflows that complement the data and processes it serves, from page layouts, feed layout, consoles, custom components, and customized pages.

Then you will need to define your Omnichannel strategy. Give a consistent experience to your customers whether they use Website, Email, Phone, Chat, SMS, Social or walk In Channels.

STEP 7

INTEGRATE YOUR SYSTEMS

Salesforce provides modern technology to make seamless integrations with your back-end systems possible at all layers of your application - data, business / application and UI.

DATA INTEGRATION APIs (SOAP, REST, Bulk), External Objects, and Cross-Org Data Sharing.

APPLICATION INTEGRATION Apex Callouts, Apex Web Services, Outbound Messaging, and Streaming API.

UI INTEGRATION Visualforce Pages, Aura Framework, Force.com Canvas.

STEP 8

PREPARE CHANGE MANAGEMENT PLAN

Salesforce's change management approach leverages a toolkit of best practices, tools, and templates to accelerate user adoption and time to value. Change Management may be be first on our list, but it's a top priority.

TO PREPARE FOR CHANGE

- Layout change management strategy
- Set adoption and success metrics
- Create a stakeholder assessment and engagement plan
- Develop a communication plan

TO MANAGE YOUR CHANGE

- Develop an organization impact assessment and mitigation plan
- Execute your stakeholder engagement plan
- Change your readiness assessment
- Develop a training plan and relevant content

TO REINFORCE CHANGE

- Train the trainers who will lead workshops
- Develop training assessments
- Create communication products
- Change your readiness sessions
- Follow up your change readiness assessment

STEP 9

A HYBRID APPROACH TO IMPLEMENTATION

Salesforce Success Services uses a proven hybrid methodology to the CRM project implementations. Waterfall-style methods are utilized to manage the overall scope, timeline, and costs of the project. But Agile methods are implemented to architect, build, and validate phases of the project to make sure the best system is delivered. This approach reduces risk as the customer gets to see the progress more often and enhance the product as you go along.

STEP 10

ROLL OUT SALESFORCE

We recommend that you roll out Salesforce to one group at a time to reduce risk, train fewer users at once, and learn how to enhance the rollout to next group. You can do that by either business unit, region, or function. Many customers deploy a “train the trainer” strategy to gain widespread adoption and best practices to make the most of their new CRM.

IT'S TIME TO PUT SIEBEL INTO RETIREMENT

There you go. Changing your CRM solutions is never an easy decision to make. But Salesforce has put the pieces in place to make the transition as smooth as possible.

You're now able to join companies like Intuit, Lexmark, and Thomson Reuters who have made the switch from Siebel to Salesforce with dramatic results.

The future filled with customer success is awaiting your implementation. We can't wait to help you get there.

SALESFORCE DRIVES SUCCESS ACROSS YOUR BUSINESS

Salesforce is the leader in enterprise cloud computing. We help companies connect to their customers in a whole new way with our sales, service, marketing, community, and analytics apps. All of these apps run on the Customer Success Platform, so you can manage all your information in one place.

To learn more, call us at 1-800-667-6389

ON PREMISES TO CLOUD WORKSHEET

Use these pages to plot your journey from Legacy Systems to Salesforce

1. DEFINE YOUR VISION

What is our long-term operating vision?

Why change, why now?

What are we changing from? To?

2. DEFINE YOUR KPI'S & GOALS

What actions and behaviors are needed to realize the vision?

What are the KPIs for business functions (sales, service, marketing, other)?

How will we measure success?

3. DEFINE YOUR CAPABILITIES

What are the priorities?

What will the system need to do to improve our metrics?

What are our core processes?

4. DEFINE YOUR RETIREMENT

What is our system transition strategy? Phased or completely replace?

If phased, what is the coexistence strategy?

What is the plan for all of the legacy data?

5. MAP ENTITIES

What are the data structures?

Who is going to cleanse the data? When? How?

When will data be moved? How? Who? When?

6. DESIGN YOUR APPLICATION

How do we optimize the end user experience?

How do we design the app to optimize the metrics identified in step 2?

7. INTEGRATE YOUR DESIGN

What are the systems of record (back-end, front-end, ERP, etc.)?

Which integration modes will be used for what? Data integration, Application integration, UI integration

What tool(s) will be used?

8. PREPARE CHANGE MANAGEMENT PLAN

Do we have executive sponsorship?

Are key stakeholders engaged?

What is our communications, planning, and execution strategy for the project?

Have we developed a sound admin and end user training? Have we accounted for different roles?

What do we have to do to ensure business success and maximize value realization?

9. IMPLEMENT A HYBRID APPROACH

How do we validate the production build, test, and deploy?

How will we support the rollout? How will we support the app after deployment?

What about data and IT governance?

How will we adapt the system to meet new business needs?

10. ROLLOUT SALESFORCE

How do we minimize risk?

What is the roll out strategy? (By business capability?, By business unit?, By region?, By end user role?)