

Global Healthcare Insurance Provider Migrated to Salesforce Lightning to Streamline and Leverage Salesforce Functionalities

Industry

Insurance

Products & Services

Lightning Experience Migration

Implementation Partner



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The customer is an American, for-profit, managed healthcare company offering health care products and insurance services. It has the reputation of being one of the largest healthcare companies in the world with a large and complex Salesforce user base.

Challenges

The client was looking for building a cost-effective collaborative Salesforce platform to increase productivity by using more advanced UI and supporting technology. Some of the critical challenges were observed during migration -

- Upgrade existing technology to stay up to date with the latest updates and releases
- New solution required to accommodate internal systems
- 3000 users with different user roles and groups
- 500 visualforce pages were required to migrate to lightning
- Manage and migrate folders and attachments of around 1TB
- Access to lightning component for building customized solutions in the Salesforce platform
- Enhance visibility with user-friendly reports and dashboards

Solution

CRM IT adopted its proven migration methodology to successfully migrate nearly 3000+ users to Lightning over a period of 10-12 weeks.

Assessment

A detailed assessment of the Salesforce instance, using a combination of Salesforce tools and manual reviews was carried out to identify areas of impact. The instance was a heavily customized instance where a lot of the standard Salesforce UX was substituted with custom-tailored UX,

using nearly 500 Visualforce pages. Migrating these pages to Lightning turned out to be the most critical factor in effecting a successful migration.

Rollout Highlights

- The rollout in multiphase which includes a proof-of-concept (POC), followed by 2 Phases to migrate the application with an agile approach
- Identify lightning incompatible UX components used across all Visualforce pages and substitute them with Lightning compatible ones during the POC Phase
- Apply lightning tags and stylesheets across all pages which were Lightning compatible and did not require components to be rebuilt
- Rebuild 20+ consoles/ application page to provide better UX using standard Lightning components
- Use Magic Mover to migrate nearly 1TB of attachments data to Salesforce files and enhanced notes respectively. This required extensive planning to ensure the attachment data can be migrated to Lightning in-time for Go-Live
- Replace existing AppExchange connectors actively used with Lightning ready equivalent application
- Conduct functional testing to validate the migrated applications across browsers and also ensure zero downtime
- Provide periodic dedicated support to address any migration issues and ensure smooth adoption

Benefits

- Enhanced customer experience by enabling the client to create more efficient processes
- Better visibility and tracking of KPIs to improve sales performance
- Achieve mobility with Salesforce 1 mobile app
- Reduction in the Sales cycle and increment in the sales productivity