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Mergers & Acquisitions on Salesforce: Framework for Success

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Agenda

- Why are we here?
- What does it mean to you?
- What are you going to do about it?
  - Workshop Overview
  - Project Plan Overview
- What next?

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Who am I?

- 7x Salesforce Certified
- Supports open conversations and transparency
- Goal: Stop things from becoming THINGS
- Loves baking and reading with his family
- Managed 10+ Acquisition Migrations

“Why are we here?”

Why are we here?

- M&A deals are a daily occurrence
- How do companies enable deal value?
    - Take care of people
    - Take care of clients
- Cohesive Lead to Cash migration, including CRM, to ensure:
    - Employees can collaborate and feel supported
    - Clients can get the support they need, and sign up for new services (and pay for existing ones) with minimal disruption

“What does this mean to you?”

M&A CRM Migration = Full Implementation

Business Requirements	User Setup	System Changes	Data/ETL	Training
Meet with impacted Users - and understand what they need from the system.	Make sure Users have the necessary permissions to complete their work as needed.	What configuration and development work is needed to support the business processes of the acquired company. New fields? Custom objects? Apex code? Service channels?	Extract, transform, and load data into your CRM from the acquired company.	Provide live training and ongoing support to Users to set them up for ongoing success.

Transparency, Empathy, Kindness

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M&A Migration North Stars

- **COORDINATE** the Lead to Cash migration for acquired companies.
- Ensure **TRANSPARENCY** to impacted users on what changes are occurring.
- Ensure **ACCOUNTABILITY** for making sure these changes are communicated, planned and prepared for properly
- Offer a **WARM WELCOME**
- Provide **ONGOING SUPPORT**

“What are you going to do about it?”

What are you going to do about it?

- Make it a team effort.
- Create a culture of inclusion and accountability.
  - Respect the work other teams will need to take on.
- Lead to Cash is chain - break one piece, and everything falls apart
  - New clients can't get boarded
  - Service can't find the information needed to support the customer
  - Incorrect bills are sent out.
- Meet with leadership to communicate the importance and value of this work.
  - Support from the top is critical for success.
- Allow for at least 6 months to complete this work.

Don't let this happen to you!

Framework:

1. Workshop
2. Go Live Project Plan/Checklist

Workshop

Vision Statement

- For the Lead to Cash process for (Acquired Company), map out current state end to end to allow us to create a map to future state to ensure that we can successfully complete a migration to the (Your Company) Tech Stack by (Deadline).
- This discussion will occur in 3 phases:
  - Lead to Contract
  - Onboarding/Implementations
  - Service
- The end product will be two things:
  - Clear understanding for teams of how to execute work now and upon a successful migration.
  - A future state map for (Deadline) that will allow us to identify any action items to meet that target date.

Tech Stack Overview

Acquired Company’s Tech Stack	Your Company’s Tech Stack
Marketing Automation	Marketing Automation
CRM	CRM
Operational/Fulfillment Databases	Operational/Fulfillment Databases
Billing	Billing
Incentive	Incentive

What are you moving from and what are you moving to?

Workshop Attendees

Lead to Contract	Operations	Customer Service	Support Teams
Marketing/Lead Generation	Operations	Customer Service	CRM Administration Team
Sales	Implementation Teams	Customer Success Managers	Billing
Pricing/CPQ		Product Success Managers	Finance/Incentives
Contract Operations			Change Management
			Technology
			Security
			Legal

Workshop Outline

Lead	Sales	Contracts	Onboarding	Service
• Website capabilities and migration plan. • Web to Case • Web to Lead • Marketing automation platform. • Lead Routing	• Account • Contact • Opportunity • CPQ/Quote • Territory • Billing • Incentive	• Submission • Signing	• How onboarded • Fulfillment platforms	• How are requests received • What applications support the case

Account and Product

Workshop
Power User Interviews

- Find a key "Power User" for each team.
- Earn their TRUST by:
  - Understanding their feelings
  - Understanding their needs
- This will set a positive tone.
  - On their side = Partners
  - Not on their side = Enemies

Go-Live Checklist:
The Plan for Success

The Plan for Success
3 Goals of the Go-Live Checklist

- Track progress against the seven Project Components
- Support WEEKLY change management meetings
  - Transparency and Accountability for all teams working
  - Stop things from becoming THINGS
- Providing high-level reporting to leadership

*"A goal without **a plan** is just a wish." ~ Antoine de Saint-Exupéry*

Go-Live Checklist: Project Components

Account Mastering

Map the acquired company's accounts to your accounts. This can be a central account database or your CRM. It is vital that a coordinated mapping is done between all internal systems using Account Data so ABC Company in the CRM is also ABC Company in Billing.

<u>Acquired Company CRM</u>

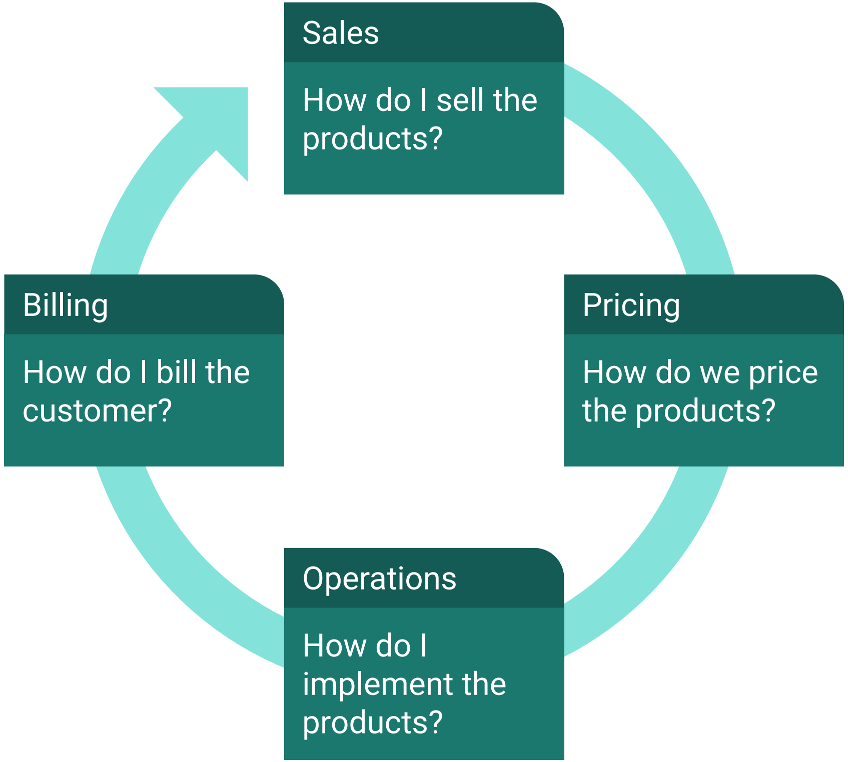
Wal-Mart, Inc. → WALMART Incorporated

<u>Your CRM</u>

CRM = Operations = Billing

Product Mastering

- Map the acquired company's products into your company's product database.
- Ensure all impacted parties agree on the structure.



Data Migration

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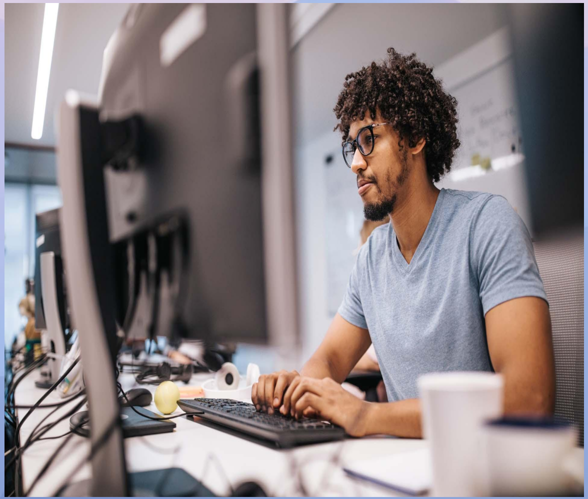
Moving data from the legacy system into your CRM.

- Accounts
- Contacts
- Opportunities
- Assets
- Fulfillment IDs
- Custom Objects

System Configuration

CRM changes required to move in the acquired company.

- Picklist values
- New Fields
- Custom Flows, Apex, etc.
- Page Layouts
- Profiles/Permission Sets



Sales User

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These Users will help the company achieve the cross sell goals set and can help customers see the future vision for the merged company. Make it a positive experience for them by:

- Ensuring Users are configured to have all the necessary access
- Communicating constantly on what is changing, when, and how they will be supported through the change.
- Provide comprehensive training and ongoing support post go-live.

Service User

These Users will help resolve customer issues and make sure customers feel taken care of during the change. Make it a positive experience for them by:

- Ensuring Users are configured to have all the necessary access
- Communicating constantly on what is changing, when, and how they will be supported through the change.
- Provide comprehensive training and ongoing support post go-live.

Training and Post Live Support

- Consistent communication leading up to the Go-Live Date
  - What to expect, when to expect it, etc.
- Comprehensive training at Go-Live so they know WHAT they are expected to do AND how to do it
- Monthly/quarterly check-ins post Go-Live to review:
  - What's going well
  - What could be improved

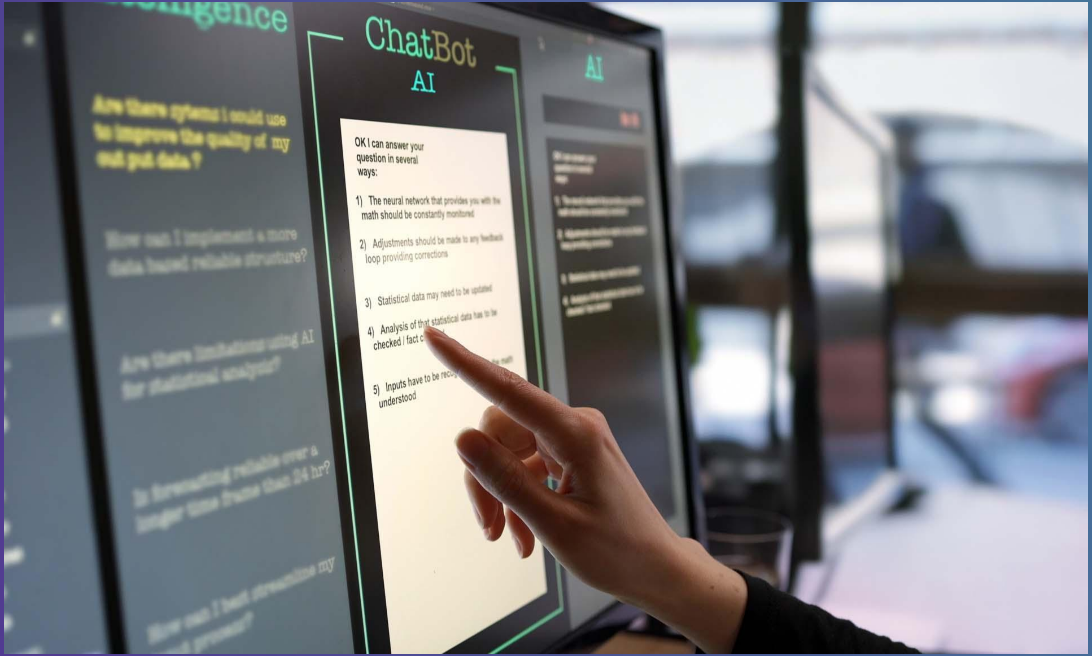
Transition to operational support

- Work with the end in mind
- Every project must have an end
- Successful integration requires intentional and measured transition into business-as-usual

What next?

Questions and Answers

I may not be an AI Chatbot… but I will do my best!



Wrap-Up

You have the opportunity to help your company and other employees navigate a complex, hard process to make sure your company meets its goals while humanely helping people through a big change management process.

Connect with me:
linkedin.com/in/jsamroberts/

3 Things:

Workshop

Project Plan

Go-Live Checklist

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