

25+ Years of Booked Assets Migration to Conga & Optimization of Asset Renewals with FloData

Insight

A global research and advisory company used a legacy homegrown application (running on an Oracle database) for 25 years to provide advisory services. The tool lacked the capabilities to adopt new process changes or business models to support the client's business.

Forsys teamed up with [FloData](#) to design a strategy for the migration and conversion of 25+ years of booked assets by product/sales users on a regular timeline. This enabled the client to surgically migrate large volumes of data, resulting in smooth organizational change management and adoption of the new processes globally.



Industry
Information Services



Revenue
\$4.5+ B



Employees
16k+



Headquarters
Connecticut, US

Business Challenge

The client's application, built on the Oracle database, underwent changes (on product data) for over 25+ years. The company built its processes and systems to meet the needs of on-off requests from clients, which led to highly customized order and renewal processes for many thousands of tailored products.

The key challenges client faced:

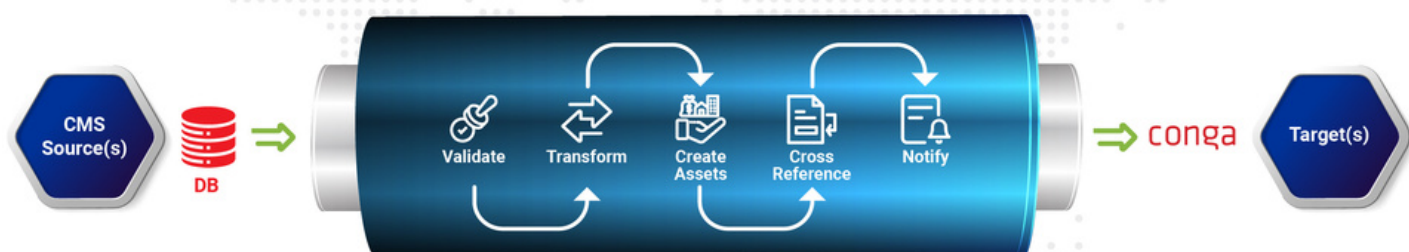
- ✓ Migration of over 140K of Order/Asset data from Oracle to Conga CPQ over multiple migration windows aligned with the global sales operations adoption of new systems and processes without impacting business operations.
- ✓ Transformation of Assets and related orders to fit the data structures of the Conga CPQ application with the tenet to minimize target system customization.
- ✓ Identification of data issues in the legacy system before migrating to Conga CPQ to ensure clean data is migrated.
- ✓ Recognition of data quality metrics pre-migration and allow the business to review and correct everything before migrating it.

- ✓ Maintenance of enterprise data security and compliance when moving critical data to the cloud (SaaS) solution.
- ✓ Migration of dependent data and maintenance of hierarchy.
- ✓ Reconciliation of migrated data between Conga & Legacy system.
- ✓ Analysis of Conga Product setup (Standalone & Bundles) with legacy orders booked to call out gaps in the product setup on both sides leading to data fixes in the Legacy system and/or updating Product setup in Conga in line with Product selling rules.

Transformation Journey

Forsys, together with [FloData](#) as the data migration partner, joined forces with the client's C-Suite to develop and define the data migration and data transformation strategy. We designed, analyzed, and pressure-tested the resulting changes to ensure that the end-to-end source-to-target migration happens in set time windows.

The scope of the project included, data cleansing, attribute mapping, migrating legacy data stored on Oracle, and modifying data as required.



Data Migration Process

Impact

After migration, the client:



Identified data discrepancies



Initiated data cleanup activities



Switched to Conga CPQ



Removed dual data entries

About the Client

The client is a global research and advisory company, which delivers actionable, objective insight to executives and their teams. As a leading and trusted advisor and an objective resource for more than 14,000 enterprises in more than 100 countries, the company provides expert guidance and tools that enable faster, smarter decisions and stronger performance on an organization's mission-critical priorities.

The combination of expert-led, practitioner-sourced and data-driven research steers its customers toward the right decisions on the issues that matter most.

Solution Components

Conga CPQ, Oracle, [FloData](#)