



CRM Leadership Series 2 of 4 "Salesforce Org Merge"

Salesforce Org Merge

Methodology, Processes, and Deliverables

An outline of our methodology to merge two or more Salesforce orgs, including tools, processes, data, metadata, integrations, security, user experience, clouds, licenses, and future road mapping.

Table of Contents

Introduction	03
Current Trends	04
Methodology	05
Case Study	06
User Workshops	07
Clouds and Licenses Audit	08
Data and Metadata Analysis	09
Process Automation	10
Deliverables and Results	11
Conclusion	12

Introduction



Welcome to our “Salesforce Org Merge” solution. This report encapsulates the process for determining if and how two or more Salesforce orgs can be merged, with strict adherence to security policies, business processes, data, metadata, integrations, Salesforce clouds, licenses, and the user experience.

Purpose of Merging Salesforce Orgs

The primary objective is to understand why and how to merge multiple Salesforce orgs to enable data-driven business decisions and efficiencies. Many businesses using Salesforce today have created or inherited multiple Salesforce orgs for various internal departments, sister companies, or via mergers and acquisitions. Businesses are now looking to consolidate these orgs into a single source of truth, streamline their business processes, and enhance user productivity.

Report Scope

We outline a strategy and methodology to determine if merging Salesforce orgs is possible, which analysis is required to make that decision, and how to move forward with the initiative. Using a variety of tools, techniques, and analyses, a determination is made along the way, complete with a roadmap and cadence for completing the merger.

"We inherited a second Salesforce org through a recent acquisition and believed it would take months to understand if it was possible to merge it into our current org. After 4 weeks, we had our answer."

Energy and Mining Manufacturer.

Current Trends

70%

"Reports indicate that while companies use over 1,000 applications, 70% remain disconnected from the core business, often resulting in fragmented, multi-org setups." - Salesforce Admins

315K

"The average business is losing \$315,000 per platform migration project, as businesses grapple with timeline overruns, employee burnout, security gaps, and tool sprawl." - CloudBees, TrendCandy

57%

"57% spent more than \$1 million on platform migrations in the last year, ultimately facing an average project cost overrun of 18%." - CloudBees, TrendCandy

91%

"Among companies with 11 or more employees, 91% already use at least one CRM system. As these companies grow and acquire other firms, they often inherit disparate CRM platforms, leading to the use of multiple systems simultaneously." – Forrester

61%

"61% of IT leaders report migration fatigue causing project delays of six months or more. The survey revealed that 70% of enterprises experienced developer burnout during platform migrations." – Cloudbees, TrendCandy

64%

"When asked about their biggest roadblocks, Salesforce customers cite modernization of legacy systems (64%) as their number one concern. For agentic AI specifically, poor data availability and quality are the leading adoption barrier (53%)." – CloudBees, TrendCandy

Methodology

1

User Workshops

Salesforce power-user and department head workshops highlight the 'A Day in the Life' user experience to gather insights on implementation, challenges, and success areas.

2

Salesforce Clouds and Licenses

A review of current Salesforce clouds, licenses, currencies, features, and add-on products provides clarity, relevance, and adoption levels.

3

Data and Metadata Analysis

Gap analysis includes managed packages, applications, objects, fields, records, page layouts, OWDs, sharing rules, permission sets, integrations, Apex classes, triggers, technical debt, and legacy customizations.

4

Business Process Enhancements

External and internal business process automations (workflow rules, process builders, and flows) are analyzed for accuracy, completeness, and recency or inactivity.

Summary

A detailed assessment of each Salesforce org, along with a gap analysis—a side-by-side comparison and contrast of features and functionality. Data and metadata, automation, back-end integrations, and user activities are well-defined and summarized.



Case Study

Energy and Mining Industry

Salesforce Merger Goals:

- Consolidate multiple Salesforce orgs.
- Upgrade to the latest Salesforce OOB features.
- Reduce technical debt, manual entry, and configuration complexity.

Overview:

The client acquired a top competitor in the industry and inherited a large Salesforce org managing sales, customer service, operations, logistics, and billing and invoicing, with approximately 200 Salesforce users. The client desired to merge the acquired Salesforce org into their existing Salesforce org to gain business efficiencies, unified analytics, and a complete digital transformation to the cloud.

Result:

- Combined Salesforce orgs for all user departments and teams while maintaining all existing role requirements.
- Upgraded the Classic UI to the Lightning UI (including apps, Flows, and Lightning Web Components).
- Archived legacy data, cleaned up, and deleted metadata technical debt.
- Established new record ownership, account teams, and approval processes.
- Created a new role hierarchy, territory model, and user security protocols.
- Increased user productivity and efficiency with new automations.
- Built new analytics reports and dashboards.
- Ensured the Salesforce org is AI-ready and enabled.



User Workshops



Workshop Goal:

Understand the Salesforce user experience, including system administrators, power and daily users, department heads, and executives.

Workshop Steps:

- Conduct "Day in the Life" one-hour sessions with selected Salesforce users.
- Capture in-app screen clicks, including objects, records, and processes with a focus on job productivity, automation, and impediments.
- Gather user areas for improvement and enhancements, prioritizing them by efficiency gains and implementation costs.

Workshop Deliverables:

- Analyze and consolidate user sessions into Salesforce categories: clouds, apps, themes, job requirements, profiles, and usage.
- Document legacy or out-of-date configurations, custom code, apps, and packages.
- Map user processes with Salesforce OOB features and benefits.
- Organize solutions into actionable project fixes with a clear operational cadence and cost projection.

Clouds and Licenses Audit

Maximizing Salesforce Licenses

- Review active contracted clouds, licenses, and add-ons.
- Audit license types with feature descriptions, active vs inactive usage.
- Group internal and external users by profile, role, security and required usage.
- Audit quantities and renewal dates.
- Structure within a single Salesforce contract (with your Salesforce AE).



Salesforce Org 1	PARTNERSHIP SUMMARY EXAMPLE	
	Contract Breakdown	Renewal Date
	Sales Cloud EE (Qty 225)	10/31/2026
	Service Cloud EE (Qty 150)	10/31/2026
	Customer Community EE, 100 Members (Qty 1)	10/31/2026
	Customer Community EE, 20K Logins/mth (Qty 1)	10/31/2026
	Partner Community EE, Logins/mth (Qty 1)	10/31/2026
	Slack Business Plus (Qty 100)	10/31/2026
	Revenue Cloud EE (Qty 50)	10/31/2026
Salesforce Org 2	PARTNERSHIP SUMMARY EXAMPLE	
	Contract Breakdown	Renewal Date
	Sales Cloud EE (Qty 86)	1/31/2027
	Service Cloud EE (Qty 57)	1/31/2027
	Slack Business Plus (Qty 25)	1/31/2027

Merging Salesforce orgs requires a complete Salesforce license audit to maximize ROI for system utilization and future budgets.

Data and Metadata Analysis

Data Audit and Analysis

- Run reports on Salesforce data in all orgs via standard Salesforce and third-party tools. Include data on all objects and records.
- Organize findings visually (via summary, bar, and pie charts) to easily identify the quantity and quality of data within each Salesforce org.
- Prioritize records by importance and severity, offering explicit recommendations on archiving, merging, and deletion.

Metadata Audit and Analysis

- Run reports on Salesforce metadata in both orgs via standard Salesforce and third-party tools. Include metadata for apps, objects, fields, templates, workflow rules, process builders, flows, profiles, users, role hierarchies, OWDs, sharing rules, and permission sets.
- Track and review managed packages (AppExchange or other solutions) and related metadata.
- Organize findings visually (via table, bar, pie, or summary charts) to understand active and inactive metadata in each org.

Integrations Audit and Analysis

- Gather existing system integration architectural maps, documents, and artifacts.
- Understand existing integration methodologies such as APIs, third-party apps, and legacy system tools.
- Compare integration solutions in both Salesforce orgs.

Deliverable:

A Complete Side-by-side
Comparison of
all Salesforce Orgs

Process Automation

Utilizing the outputs from the workshops and data and metadata analysis, our next step is to review active business process automations. Salesforce automation tools, such as workflow rules, process builders, Apex triggers, and flows must be compared to highlight legacy configurations, overlapping processes, and redundancies.

Tip:

We gather any legacy or current process documentation artifacts available. We highlight if legacy configurations and automations need to be upgraded or retired in favor of the latest Salesforce features and functionality.

Several Specific Areas Requiring Attention:

- **Workflow Rules and Process Builders:** Check for consolidation and migration to Flows
- **Apex Triggers:** Inspect for recency, API version, consolidation, and migration
- **Visualforce Pages:** Consider conversion to Lightning Web Components (LWCs)
- **Approval Processes:** Review for usage, accuracy, and timeliness
- **Lead Conversion:** Examine for completeness and accuracy
- **Case Assignment and Escalation:** Evaluate users, groups, and out-of-the-box features



Deliverables and Results

Deliverable 1

Documentation:

- Format: Word or Similar
- Table of Contents
- Salesforce Clouds and Licenses
- User Workshops
- Data and Metadata Reports and Charts
- Recommendations
- Future Roadmap by Phase

Tips:

The document can also serve as a "guide" for the Salesforce delivery team to create an Agile project implementation with Epics, User Stories, Tasks, Sub-Tasks, etc.

Deliverable 2

Executive Summary:

- Format: PowerPoint or Similar
- Summary of Analysis
- Side-by-side Org Comparison
- Recommendations with Benefits
- Scorecard by Department
- Future Roadmap by Phase with Cost Projections
- Next Steps

Tips:

The document serves as a high-level summary of the analysis, with an emphasis on solving current business problems with related benefits by merging the Salesforce orgs.



Conclusion

Thank you for your interest in merging Salesforce orgs. Each Salesforce org merge determination is reliant on a multitude of factors, including efficiency benefits, cost savings, org age, back-end system integrations, and usage patterns. We utilize a strict methodology to ensure accurate and consistent results for our clients.

Finally, most Salesforce orgs have endured a variety of configuration changes through the years due to evolving business needs, mergers and acquisitions, IT staff turnover, and transitions between multiple service providers. Thus, it is important to highlight the key areas of success in each Salesforce org (i.e., configurations that are working properly) while identifying explicit opportunities for improvement.

If you would like to discuss merging your Salesforce orgs, please contact us.



Salesforce Orgs Merge

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