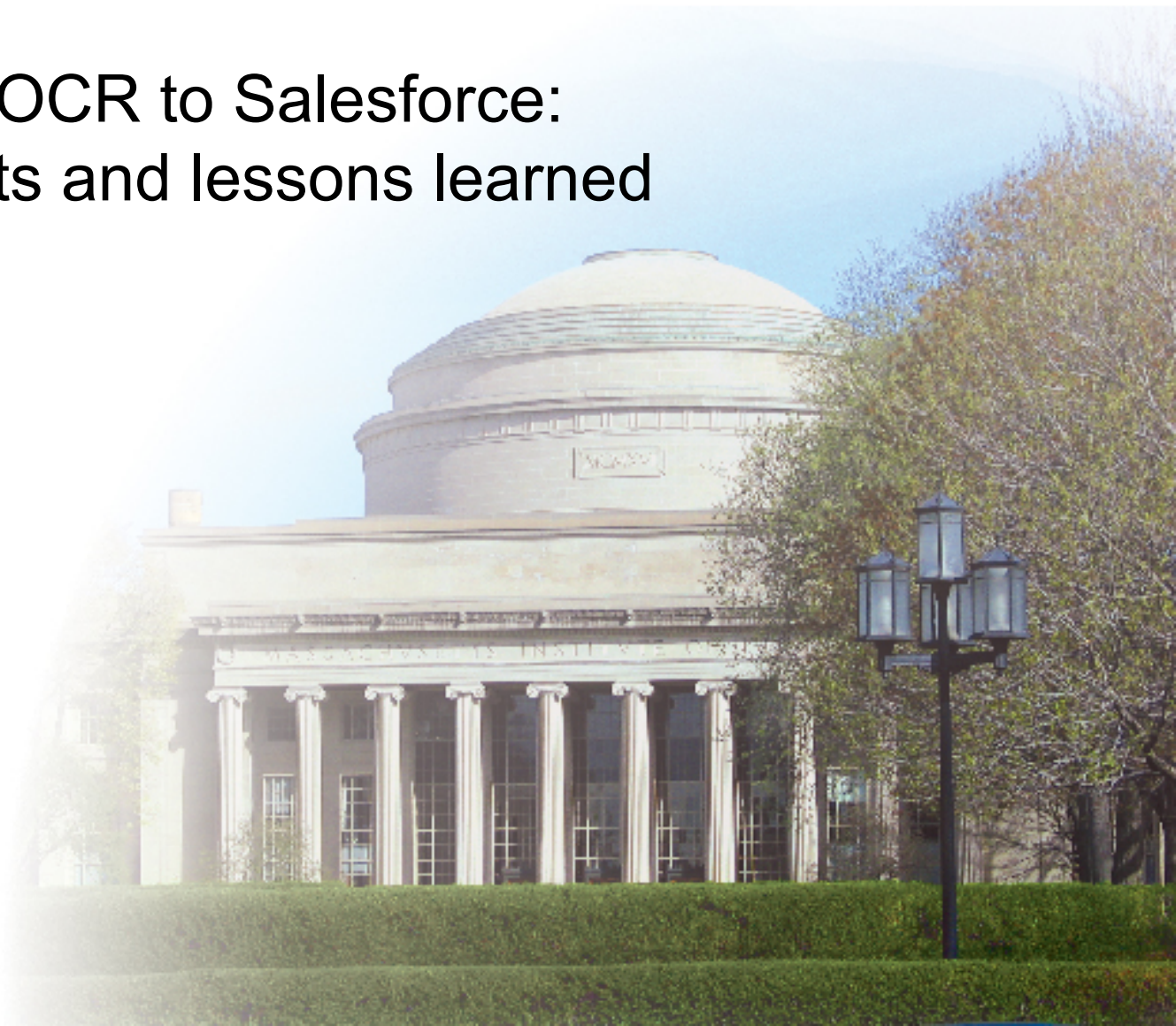




MIT Office of Corporate Relations

Migrating the OCR to Salesforce: highlights and lessons learned

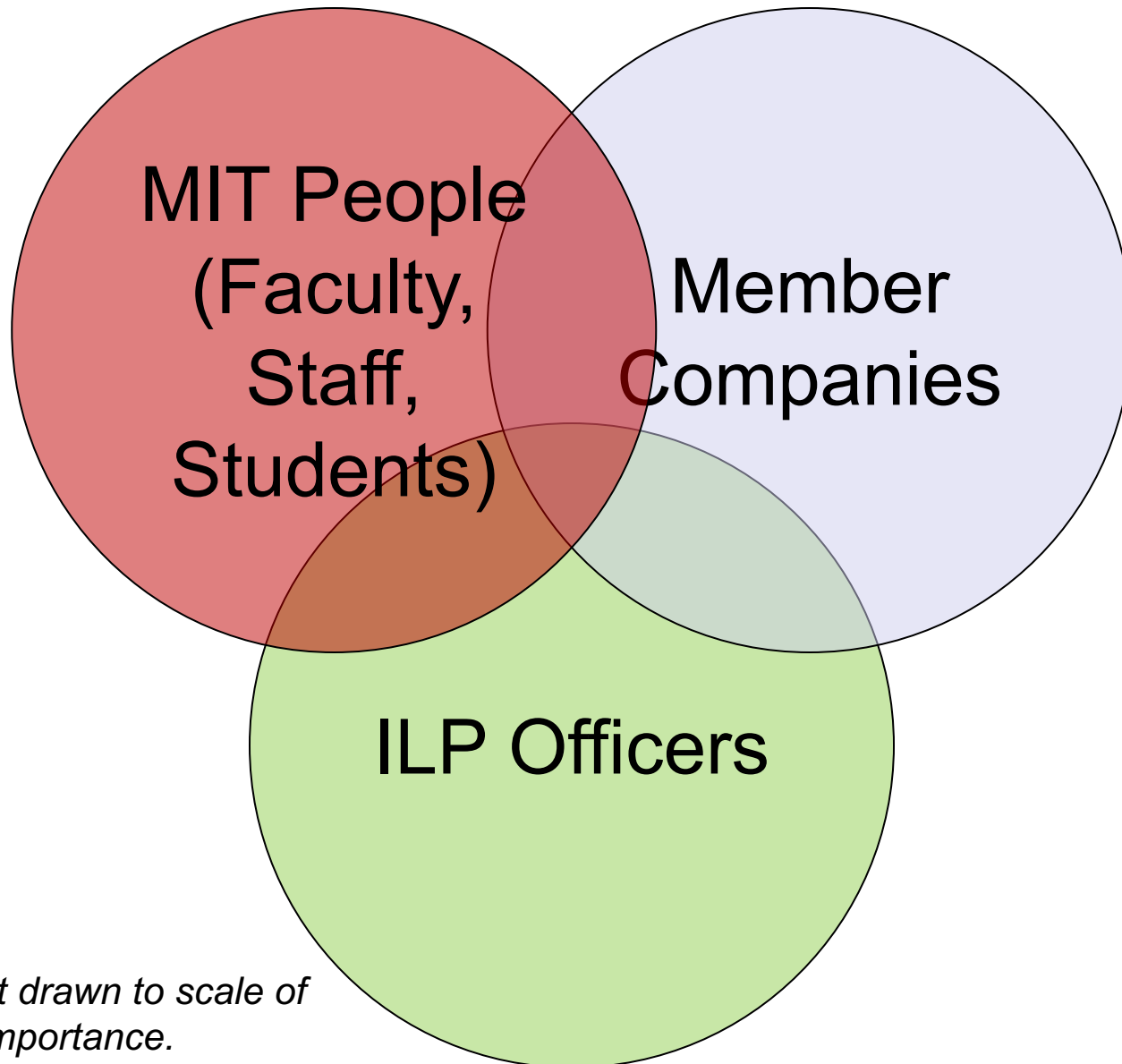
Erik Vogan
Senior Industrial Liaison Officer
evogan@mit.edu
+1 (617) 258-6589
+1 (617) 460-7927



- Introduction
 - Who am I and why am I talking to you ?
- Our migration situation
 - What are we attempting and why ?
- Key takeaways
 - What did we learn (or reinforce) ?
- A few examples
 - Where the rubber met (or missed) the road !

- Me
 - Industrial Liaison Officer (ILO) in the MIT Office of Corporate Relations
 - A Ph.D. biochemist with half an MBA (Sloan EMBA '18)
 - A reformed scientist, now a salesperson
 - Previous experience managing IT groups and administering a SF Org
- The Office of Corporate Relations
 - The largest conduit for Industry interactions with MIT
 - Approximately 50 people, with ~ 30 ILOs
 - Over 230 member companies, hosting over a thousand visits a year
 - A pretty traditional sales organization, with a few twists

- The data and viewpoints presented fit our situation ...
 - ... but they may not fit yours !
- In the interests of time, I am making general statements.
 - Don't believe a word of it. Life is the special case.
 - But there *may* be useful nuggets of information, so bear with me.
- AKA:
 - YMMV
 - Caveat emptor
 - Etcetera

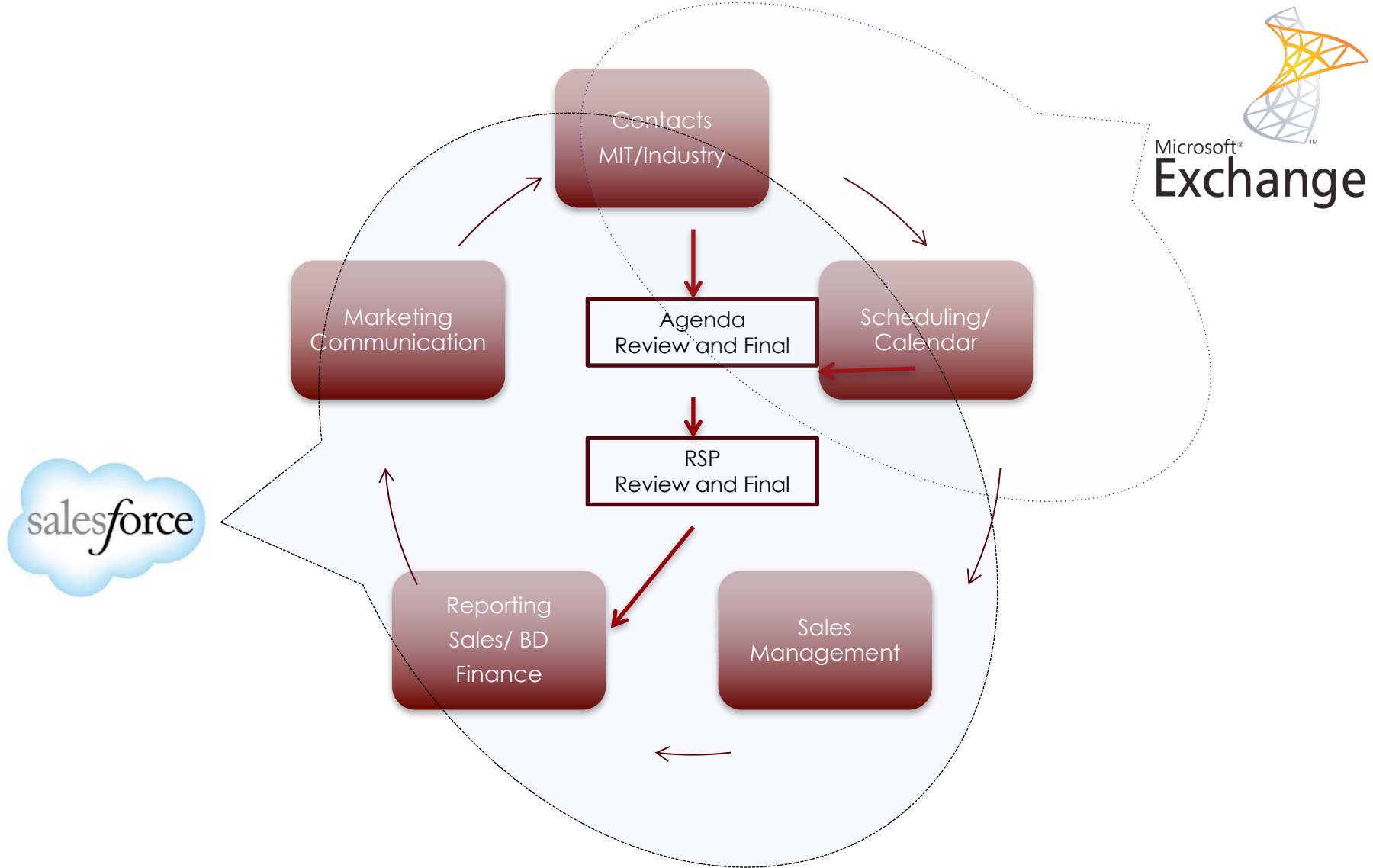


** Shapes not drawn to scale of relative importance.*

- CRIS – the existing solution (pre-migration):
 - **C**orporate **R**elations **I**nformation **S**ystem
 - Implemented in 2005
 - Built on 4D RDBMS
 - Custom (Mac) desktop client
 - As of 2016 contained:
 - **91,000** Contacts
 - **17,000** MIT related people
 - **10,000** Companies
 - Data dating to 1993

**So, yeah, this was all very impressive in 2005,
but today ... not so much.**

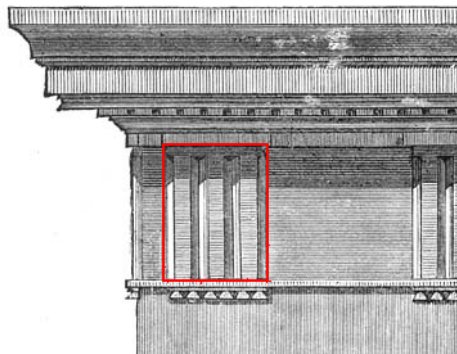
- Why move away from CRIS ?
 - The software was no longer supporting our business needs ...
 - While we work internationally, CRIS could only be accessed from the office.
 - Even on campus, we could not access the information on our pocket supercomputers.
 - Our Japanese office needed to use a rather dramatic duct tape and barb wire workaround to access CRIS.
 - We are working more collaboratively and the old system could not (easily) support that.
 - Cracks were starting to appear in the “not entirely mainstream” software product dike.
 - Particularly issues with support for newer version of Mac OS.
 - There was a longer term, strategic goal to break out of our data silo.



- Will you hire an implementer or consultant ?
 - Is your organization five people or less ?*
 - Do you find the Salesforce (sales oriented) point of view and data structure fits you and your organization like a glove ?*
 - Are you looking for a project that will consume > 60% of your time for the next six months ?*
 - ... then feel free to skip this step.*
- Otherwise ... reasons to hire an outsider:
 - You don't do this every day.
 - You likely won't do this more than once.
 - You aren't a Salesforce / visualforce expert.
 - You probably don't want to take the time to crawl up the learning curve.

- Have strong project management, on both sides of the table
 - **Implementing Salesforce is not something you do *in addition to your full time job*.** Find ways to free up the resources to do it right.
 - Spend the time to map your business processes. This will pay off, over and over and over.
- Bring all of the stakeholders to the table
 - **It is about the people, not the tools or processes !**
 - Make certain everyone understands what the tool will (and won't) enable.
 - Make certain everyone has a voice. Importantly, don't give one group an outsized voice without an explanation.
 - Integrate across all the functions in your organization. Make systems level decisions carefully, and document them !

- Make the tool fit your business, not your business fit the tool
 - Start by understanding what Salesforce can do for you. Test it out, or find someone using it and talk with them.
 - Map your business processes !
- Beware the traps of skeuomorphism (or embrace them)
 - Don't bind yourself, and your processes, to the way things had to be done in the past.
 - Understand and leverage the power of news ways of viewing your data *and* your organization.



- Think carefully about the value of your data
 - Should you migrate it all into Salesforce ?
 - What is the value of older data ?
 - Can you put concrete numbers on:
 - How often you will utilize very old data ?
 - What it's value is relative to the cost of migration ?
 - What decisions to retain that old data do to your data structures ?
 - How you are going to clean your data, either before or after migration ?

Data as of 2016:

91,000 Contacts

17,000 MIT related people

10,000 Companies

Data dating to 1993

- Implementing Salesforce is a journey, not a destination
 - After you have “finished” implementing a Salesforce solution, you will need to maintain it.
 - Who in your office is going to be responsible for the care and feeding of the system ? Make certain they understand what they are signing up for and get them the training and support they need.
 - Resign yourself to not getting everything right out of the gate. Small changes (layouts, new custom fields, picklists, etc) are easy to make. Find someone who can be comfortable making those changes.
 - The sheer flexibility of the tool will mean you (and your users) won't be satisfied with the solution you have out the box. Embrace this.
 - Training, training, training. User training. Admin training. All of it.

- A first example – that process everyone understood ...
 - The OCR has a well documented, and well understood, process for organizing and documenting certain visits, either by faculty or by officers. This is not our most common process, but not our most rare, either.
 - That process was shared with our consultants, documented, agreed upon, and implemented.
 - Only after implementation was it discovered that the well understood, well documented process did not actually work the way everyone understood it to work.
 - One person had recognized the shortcomings of the documented process, and had been, for years, silently disaggregating the data, prior to submission to the CRM.
 - We are now implementing solutions, including a revised process and workflow.

- A second example – that process everyone wanted ...
 - The OCR has a well documented, and well understood, process for ... yeah, this bit is the same.
 - The one “must have” feature, according to a central group of users, was a bit of custom code to make a relatively time-consuming and onerous workflow more efficient.
 - However, the newfound flexibility Salesforce affords, and the real-time, interactive access to the data, have prompted us to think about revising our workflows and processes.
 - We are now collaborating more, and looking for ways to take that to the next step.
 - And the “must have” feature ? Skeuomorphism in action. It brilliantly supports the old way of working, but may have less utility as we move forward.



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