Considerations for Your Oracle to Salesforce Service Cloud Cloud Transition
Starting in 2017, PolSource has been at the forefront of discussions with several current Oracle Service Cloud customers considering a transition to Salesforce Service Cloud. Utilizing our strong background with top retail, entertainment, consumer packaged goods, and manufacturing brands, we have helped several of these companies transform the way they serve their customers. We’ve guided these teams to develop processes and refined our tools to accelerate and simplify the transition.
Why change?

Transitioning platforms is filled with costs and challenges. Each platform has unique features that will be missed, and every change comes with hard costs on top of the toll it can take on the organization. There are a variety of reasons for which organizations consider a transition from Oracle to Salesforce. Below are a few that we commonly hear.

Development and Support

Many current Oracle customers considered both Oracle and Salesforce Service Cloud when making their original CRM investments often choosing a combination of Salesforce Sales Cloud and Oracle Service Cloud, sometimes resulting in a clumsy integration between the two.

However, in the last 3-4 years, Salesforce has made a significant investment into Service Cloud. Now, Salesforce Service Cloud is extremely competitive and is recognized by industry analysts as the leader in CRM Customer Engagement Centers. Salesforce has reached virtual parity in features and in most areas eclipsed the Oracle feature set.

Conversely, Oracle Service Cloud improvement could be considered arthritic. Recent Oracle releases represent small incremental gains in the browser interface and packaged integrations to other Oracle products. To further complicate matters, Oracle began shifting their investment from Service Cloud to their Engagement Cloud product.
Platform

The Salesforce Platform was designed to offer sales, service, and marketing teams with a single integrated view of the customer. It was built to be extended—whether adding objects, behaviors, or business logic. Salesforce builds its products on their own platform so if you use another feature of the platform, for example Field Service Lightning, it will have a familiar user interface, be part of the same object model, have a similar API and combined administration. Customers also get to take advantage of the substantial amount of functionality on Salesforce that can be customized with a clicks-not-code approach.

The Oracle Service Cloud platform was built to be extended but it stops there. Even some features considered part of the Service Cloud product are bolt-ons which Oracle acquired and loosely “integrated” such as Oracle Policy Automation, Engagement Engine, Knowledge Advance, and Field Service Cloud. Any integrations to sales or marketing applications are done by moving data.

Another important consideration is how each product is upgraded either through the time-intensive Oracle process or the Salesforce touchless upgrade. Salesforce releases 3 times a year, so easy upgrades allow a customer to take advantage of all of the new features, bug fixes, and improvements quickly.

Our customers tell us that they’re eager to have the advantages of the Salesforce platform; integration, extensibility, scalability, security, and regular releases.
Browser-Based

While there was a time that a desktop client could provide functionality that the browser lacked, that time has passed. Browser-based applications have rich controls, high interactivity, and are highly responsive. Using a browser-based client takes away the need to handle installation, troubleshoot desktop issues and deal with most virtual desktop problems.

Salesforce mobile capabilities are second-to-none. Since the mobile application relies on the same metadata structure, little work needs to be done to configure the mobile app for use by agents, supervisors, and operations staff.

Advanced Features

The Salesforce platform offers a number of advanced features often requested by Oracle Service Cloud customers, but not yet available.

- Advanced Security Controls – including field-level security, encrypted fields, and record-sharing
- Complete Deployment Control – create sandboxes and transfer configuration and customization between environments easily
- Granular Auditing – Salesforce doesn’t prescribe the fields that can be tracked and audited
- Advanced Channels – SMS, video chat, and social channels for customer engagement
- Integrated Data Quality – easy-to-use tools to find and manage duplicates and validate incoming data
- Integrated Artificial Intelligence – Einstein AI is currently used for a variety of applications (e.g., chatbot) and has a growing presence throughout the application
- Field Service Lightning – a field service application that integrates seamlessly with your service application
- Chatter – rather than add a customization to forward and track incidents, allow your organization and partners to collaborate and follow cases using Chatter.
- ...and many, many more – Omni-channel routing, advanced Communities features, macros, Open CTI, Salesforce-to-Salesforce to name a few...
Thriving Ecosystem

Salesforce’s community is thriving, passionate, and engaged. This community is growing with the product feature set and customer footprint. This ongoing growth makes it easier for a customer to find administrators, developers, and partners who are excited to work on the product.

As part of the ecosystem, Salesforce has provided great tools for learning and demonstrating skills necessary to build and maintain the application. Salesforce Trailhead is a self-paced training portal that helps users get up to speed on every aspect of the product, as well as other business skills. Salesforce is well-documented, providing users and administrators easy access to their questions. In addition, Salesforce certifications provide and demonstrate an overall mastery of a specific role and are a great way to gain skills or identify candidates for defined jobs and projects.

As part of the ecosystem, Salesforce AppExchange is the world’s largest business applications marketplace, with a home to over 3,000 apps and components that extend Salesforce’s reach and functionality.
What Should I Consider?

A successful Salesforce transition has the power to substantially improve your brand and you should carefully consider some of the following things.

Prepare to Investigate

When the decision is made to transition, it is critical that the current Oracle implementation is captured to understand the historical configuration and customization… and how, or if, those functionalities are needed in the new environment. This critical component is successfully completed through review of historical documentation, reverse engineering, strong communication and current documentation. This will serve as a guideline for your new system’s design.

Prepare to Learn

Learn the Lingo. In Salesforce, “incidents” are called “cases”. “Workspaces” and “page layouts” have a similar role. Most “custom processes” are replaced by “Apex triggers”. Salesforce offers some new configuration options. Profiles let you set user permissions, but permission sets allow you to layer on extra permissions to allow for more flexibility. Data access is not all-or-nothing, but field-level permissions can be set. These will all be second nature soon enough, but it can be a little daunting at first. Make sure you are prepared to take the time to learn the Salesforce platform.

Prepare to Change

Don’t underestimate the amount of organizational change management that needs to be planned for and managed to achieve overall success. Rethinking internal processes from the outside-in using the lens of customer needs, desires, and expectations and designing them with knowledge of the supporting Salesforce capabilities is the first step.

Legacy customizations and old integrations may have limited value and your investment to delivering optimal levels of service can only be realized with a thoughtful transition to Salesforce.

An experienced partner can help ease your transition: helping you prepare, investigate, learn, and plan your transition.
Why PolSource?

PolSource is a trusted Salesforce partner for implementing all aspects of the product. Our Service Cloud experience in both Oracle and Salesforce is unmatched. We have proven success helping clients make this transition, from which we have built a methodology and tools that will make sure the project is successful and limit surprises.

Our Service CRM Experience

PolSource has been a Salesforce partner for over 10 years and have worked on over 300 projects. Our team has a deep understanding of contact center operations. We have the expertise to work with your team to understand your unique contact center needs and help you design a solution that will be more efficient, raise customer satisfaction, and lower costs.

PolSource has dedicated employees who have deep expertise in Oracle Service Cloud and Salesforce. Several employees have over 5 years direct employment with RightNow/Oracle and Salesforce. Combined, we have over 50 years of experience in Oracle Consulting and RightNow Professional Services. We have a deep understanding of Oracle Service Cloud implementations and know how to investigate your configuration. We also have deep expertise in Salesforce implementations and know how to guide you to make the best implementation decisions.

PolSource Advisory Services

Our PolSource Advisory Services team has the experience to understand that a service platform transition represents more than just a change in technologies and what it takes to get it right the first time. A service platform transition represents an ideal opportunity to rethink customer service in terms of contact handling processes, channels supported, and overall customer experience.
PolSource OneSource Methodology

PolSource is in the unique position of being able to offer our customers a complete CRM Services experience. From strategic Advisory offerings to Projects and Managed Services. We bring real value at a rapid rate to our customers.

The PolSource OneSource Methodology provides a framework for delivery of any type of engagement to provide structure, communications, and measurement—leading to a predictable outcomes. The methodology begins with a solid base of strategic planning and solution architecture followed by an agile delivery approach. PolSource works with your team focusing on enablement throughout the project lifecycle so there isn’t only a successful go live but long-term success on the Salesforce platform.
Oracle-to-Salesforce Methodology and Tools

We have built a methodology specific to Oracle Service Cloud transition projects. This methodology is layered on top of our PolSource OneSource project methodology and mostly guides the discovery process to help make sure that the investment you have already made in Oracle is translated to your Salesforce implementation project.

We have developed a number of tools to help make sure that you have analogous functionality after the transition, are able to take advantage of Salesforce’s best functionality, that your budget can be met and that nothing gets missed.

Our tools include:

**Oracle Service Cloud Analysis Checklist**
This checklist ensures that our team has checked every part of your Oracle implementation so that if anything is specially configured or customized, we can recommend an analogous approach within Salesforce, whether that is like-for-like or a different approach is recommended.

**Oracle Service Cloud Metadata Analysis Tool**
This tool allows us to analyze the metadata within Oracle and makes recommendations on how to map data between Oracle and Salesforce.

**Oracle Service Cloud Data Transformation Tool Set**
This set of tools helps us to extract and transform data from Oracle Service Cloud to the appropriate objects within Salesforce. More than just transferring Incidents to Cases, this tool helps move things in the right order, at various stages in the implementation and ensures that nothing is missed.
PolSource Oracle-to-Salesforce Service Cloud Offering

The following is an outline of our current offering that is custom-tailored to your implementation needs.

- **Advisory Services**
  - CRM Transformation and Roadmap
  - Change Management Guidelines
- **Knowledge Transfer and Training Support**
  - Salesforce Crash Course for Oracle Service Cloud Administrators
  - Train-the-trainer
  - Knowledge Transfer
  - System Documentation
- **Managed Services**
  - Tier 2 support of solution
  - Enhancements and future releases

- **Configuration and Data Transition**
  - Oracle Service Cloud Investigation & Recommendations
  - Salesforce Platform Setup
  - Users, Profiles, Permissions and Sharing
  - Custom Object Setup
  - Business Process Implementation – Auto-response, Approvals, Escalations, Entitlements/SLAs, Workflows, Processes, Triggers
  - Application Layout – Tabs, Page Layouts, Snap-ins, Dashboards, Reports
  - Case Management Setup – Phone, Email, Web
  - Knowledge Setup
  - Community Setup
  - Live Agent (Chat) Setup
  - CTI configuration
  - Data Transfer

Our team will work quickly and collaboratively. We are committed to delivering high quality solutions for our clients at a reasonable cost through onshore leadership and offshore support.

Our offerings can be customized. Perhaps you are currently only using Oracle Service Cloud for chat—we can help you transition just that one feature and make recommendations for other areas that might benefit your team. We can also help transition things like:

- Complex customizations
- Desktop integrations
- Data integrations
Case Study

Industry
Retail – Overstock, Inc. is an American internet retailer headquartered in Midvale, Utah, near Salt Lake City.

Challenges
Overstock, a long-term Oracle Service Cloud customer, wanted agents to have real time engagement on more scalable channels, and have a 360 degree view of the client. The management team needed better visibility into agent KPI’s and relevant knowledge articles to automatically surface for the agents based on case information. The team wanted to eliminate the necessity for copy/paste and moving between multiple applications by designing a streamlined Customer Care console, and increase case deflection through improved self-service experience. Also, there wasn’t an efficient process to onboard partners.

Solution
We replaced Oracle Rightnow with PolSource Simplified Desktop: Service Cloud, Community Cloud, Live Agent, CTI, Knowledge, Omni-Channel, Social Customer Service, and Einstein Discovery

Integrations: Order Management, Aligning with Overstock Schedule, eBay, Aspect, Quiq for SMS, Aspect Lighting CTI

Results
Faster case resolution times realized due to the agents’ abilities to more efficiently navigate the solution. It is now seamless to onboard Customer Care Reps and partners within the Simplified Desktop.

Watch the video: https://www.youtube.com/watch?v=8KSZ6Kj26vU

“A major CRM replacement in 5 months is no small feat, doing it with minimal impact to your business on time and under budget is the definition of excellence”

Tyler Forbes Cook, Overstock Director of Product Management & Development
More Information

We would love to talk to you about your project. Our team is ready to help you tailor a plan to get the most value out of the Salesforce platform.

PolSource is a Global Salesforce Consulting Partner. We are lightning accredited, offer Advisory, Delivery, and Managed Services in all of the Salesforce Clouds. PolSource has a 10-year relationship with Salesforce, customer service expertise, and a sole focus on delivering Salesforce projects. We have 250 employees with over 300 certifications and a 9.9 CSAT score. Our customers include: Nike, Overstock.com, T-Mobile, Volvo, Salesforce, and Toyota.

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