![Xoriant logo]

CRM DATA MIGRATION USING INFORMATICA FOR A PHARMACEUTICAL FIRM

90% reduction in the turnaround time to populate real-time data between multiple CRMs

Client Background

Our client is a leading pharmaceutical company that develops, produces and markets pharmaceutical products for the treatment of diabetes care, hemostasis management and hormone therapy. The client used Organization Manager (OM) as well as Veeva Align to handle multiple CRMs. Organization Manager is an application used as a master for non-customer related employee and territory data entities. Veeva Align enables a modern territory alignments process that gives commercial teams more direct control of the business process. The client's operational data was being manually migrated from one CRM system to another. A solution was needed to automate migration of the client's operational data from one CRM system to another CRM system and eliminate the time-consuming manual process of moving unsynchronized data to manage operations. The process from Organization Manager to Veeva Align was not part of this project scope. Our efforts included keeping the old and the new systems in alignment in the interim until the entire CRM data was working seamlessly in Veeva Align.

The key objectives included:

- Build an automated process to migrate operational data between the existing CRM systems
- Enable bi-directional synchronization of data between CRM systems on need basis until completion of data migration to Veeva Align

KEY BENEFITS

- Enabled 90% reduction in the time taken for data migration from one CRM to another with process automation
- 90% of the usual support cost was reduced as the manual data migration steps such as data ingestion were automated
- Automated email delivery feature to alert data invalidations through Informatica email generation

Xoriant Solution | Key Contributions

Xoriant enabled the client with an automated process for seamlessly migrating data from Veeva Align to Organization Manager, and vice versa. Since some part of data was still populated in Organization Manager, the client wanted it to be migrated to Veeva Align wherein our automation was deployed. Our team kept Organization Manager and Veeva Align synchronized as symmetrical systems. The bi-directional synchronization was necessary to prevent roadblocks in the integration of upstream and downstream data in the data pipeline until the consolidated data was successfully migrated to Veeva Align. After the project completion by Xoriant, the data alignment automation would continue to support the client until their entire CRM data got migrated to Veeva Align. Our key contributions included:

- Moved files from sources (OM & Veeva) to Staging Area
- Performed ETL processing using Informatica
- Loaded Organization Manager with validated data

Moved files from sources (OM & Veeva Align) to Staging Area: To maintain both the CRM systems operational for some time, our team extracted data from Veeva Align and sent it to Organization Manager, with provision for a reverse process on need basis. For data migration from Veeva Align to Organization Manager, our experts moved the files containing data (Territory Hierarchy, Product Assignment, ZIP-TERR) from Veeva Align into a Staging Area. Oracle was used for staging database.

Performed ETL processing using Informatica: Our team developed Unix shell scripts which would run at regular short duration intervals and copy the files into Informatica for ETL processing. We used Informatica as an ETL tool to process the data which would be ingested into Organization Manager.

Loaded Organization Manager with validated data: We performed multiple data validation and data operation checks to ensure consistency of data. The data files with N level of hierarchy were resolved to generate multiple output files. Error handling and processing was done using a data model in Informatica which would validate the data at 3 levels. The final output was a pipe delimited DID format file loaded into the Organization Manager. Also, the input and output were both CSV (pipe delimited) files.
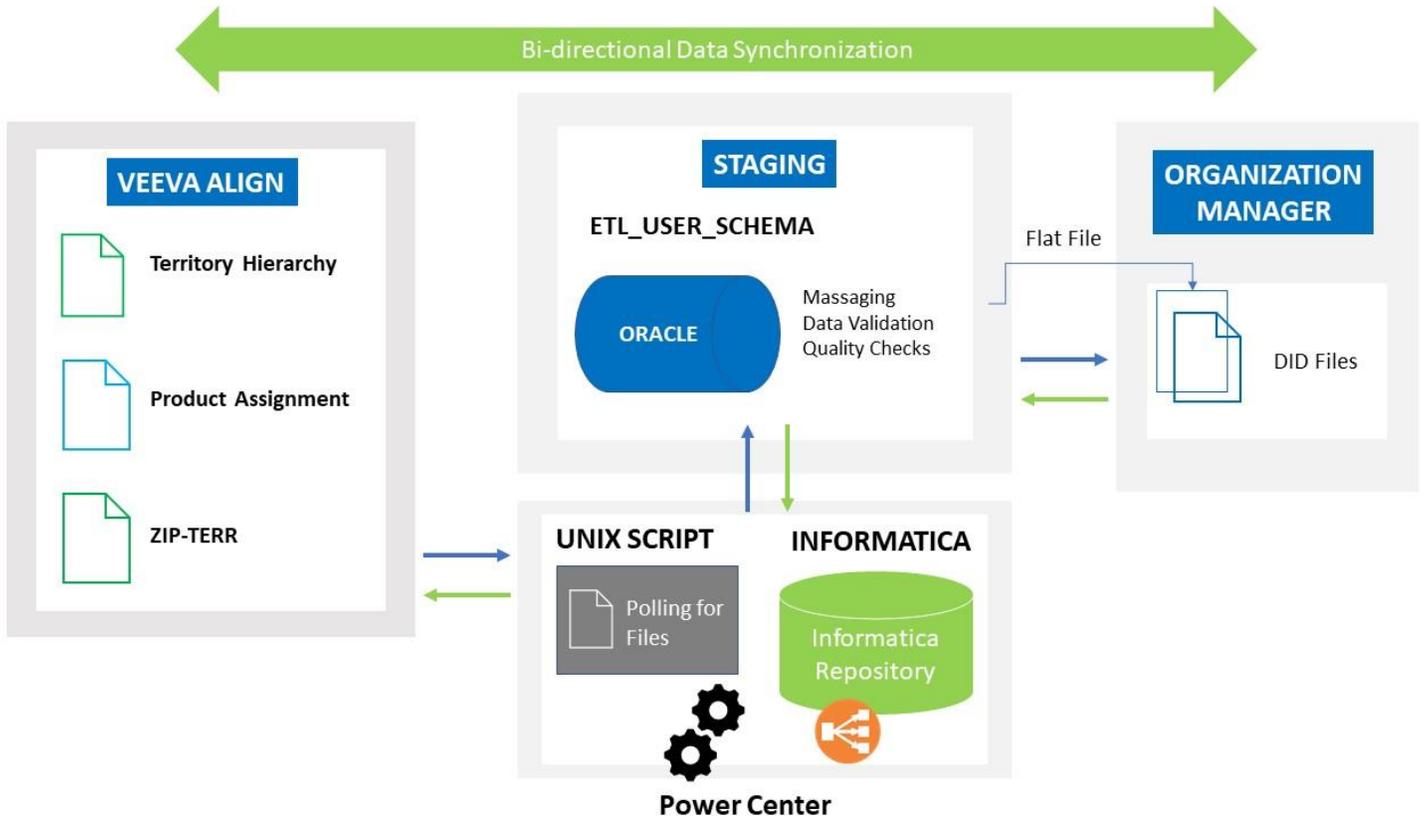
Client Testimonial

" *Xoriant minimized the time taken for our CRM data migration with automation and enabled us to manage data from multiple CRMs efficiently.* "

High Level Architecture

Technology Stack

Unix | Informatica | Oracle