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Salesforce Org Merge

Methodology, Processes, & Deliverables

An outline of our methodology to merge 2 or more Salesforce Orgs including tools, processes, data/metadata, integrations, security, user experience, clouds/licenses, & future road mapping.

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INTRODUCTION

Welcome to our “Salesforce Org Merge” solution. This report encapsulates the process for determining if & how 2 or more Salesforce Orgs can be merged with adherence to security policies, business processes, data/metadata, integrations, Salesforce clouds/licenses, & 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 & efficiencies. Many businesses using Salesforce today have created or inherited multiple Salesforce Orgs for various internal departments, sister companies, or thru mergers & acquisitions. Businesses are now looking to consolidate these Orgs into a single-source-of-truth as well streamline their business processes & enhance user productivity.

Report Scope

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

"We inherited a second Salesforce Org thru 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.



Impediments

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 reporting 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 is the leading adoption barrier (53%).” – CloudBees. TrendCandy

Methodology

1

User Workshops

Salesforce "Power User" & department head workshops highlight "A Day in the Life" user experience to gather insights on implementation, challenges, & success areas.

2

Salesforce Clouds & Licenses

A review of current Salesforce Clouds, Licenses, Features, & Add-on Products provides clarity, relevance, & adoption levels to maximize investment.

3

Data / Metadata Analysis

Gap Analysis includes Managed Packages/Apps, Objects, Fields, Page Layouts, OWDs, Sharing Rules, Permission Sets, Integrations, Apex Classes/Triggers, Tech Debt & Legacy Customizations.

4

Process Automation

External and Internal Business processes automations (Workflow Rules, Process Builders, & Flows) are analyzed for accuracy, completeness, & recency.

Summary

A detailed assessment of each Salesforce Org along with a gap analysis - **side-by-side** compare & contrast of features & functionality. Data and Metadata, automation, back-end integrations, and user activities are well-defined and summarized.



Case Study

Client:
Energy & Mining Industry

Salesforce Merger Goals:

- Consolidate multiple Salesforce Orgs
- Upgrade to latest Salesforce OOB features
- Reduce tech debt, manual entry, and configuration complexity

Overview:

Client acquired a top competitor in the industry and inherited a large Salesforce Org managing sales, customer service, operations, logistics, & billing/invoicing with approximately 200 Salesforce Users. Client desired to merge acquired Salesforce Org into existing Salesforce Org to gain business efficiencies, unified analytics, & complete digital transformation to the cloud.



Results:

- Combine Salesforce Orgs for all user departments and teams maintaining all existing role requirements.
- Upgrade Classic UI to Lightning UI (flow, lightning components, etc.)
- Archive legacy data, clean-up, delete metadata technical debt
- Establish new record ownership, account teams, & approval processes
- Create new role hierarchy, territory model, & user security protocols
- Increase user productivity & efficiency with new automations
- Build new analytics reports & dashboards
- Ensure 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" 1-hour sessions with selected Salesforce users.
- Capture in-app screen "clicks" including objects, records, processes with focus on job productivity, automation, and impediments.
- Gather user areas for Improvement and enhancements and prioritize by efficiency gain and implementation cost.

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, coding, apps, packages, etc.
- Map user processes with Salesforce OOB features and benefits.
- Organize solutions into actionable project fixes with cadence and cost.

Clouds and Licenses Audit

Maximizing Salesforce Licenses

- Review active contracted clouds, licenses, & add-ons.
- Audit license types with feature descriptions, active vs. inactive usage.
- Group internal and external users by profile, role, security & 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 - maximize ROI for utilization & future budget

Data, Metadata, Integrations

Data Audit & Analysis

- Run reports on Salesforce data in all Orgs via standard Salesforce and 3rd party tools. Include data on all objects and records.
- Organize visually (summary, bar, pie charts) to easily identify quantity & quality of data within each Salesforce Org.
- Prioritize by importance and severity with recommendations on archiving, merging, and deletion

Metadata Audit & Analysis

- Run Reports on Salesforce Metadata in both Orgs via Salesforce and 3rd party tools. Include metadata for Apps, Objects, Fields, Templates, Workflow Rules, Process Builder, Flow, Profiles, Users, Role Hierarchy, OWDs, Sharing Rules, Permission Sets, etc.
- Track & review all Managed Packages (AppExchange or other) & related metadata.
- Organize visually (table, bar, pie, or summary charts) to understand active & inactive metadata in each Org.

Integrations Audit & Analysis

- Gather existing system integration architectural maps, documents, & artifacts.
- Understand existing integration methodologies such as APIs, 3rd party Apps, & legacy system tools.
- Compare integration solutions in both Salesforce Orgs.

Deliverable: Complete Side-by-Side Comparison of all Salesforce Orgs

Process Automation

Utilizing the outputs from the Workshops & Data and Metadata Analysis, our next step is to review the active business process automations. Salesforce automation tools such as Workflow Rules, Process Builder, APEX Triggers, Flow, etc. need to be compared & contrasting to highlight legacy configurations, overlapping processes, & redundancy.

Tips:

We will gather any legacy or current process documentation artifacts that you may have available.

Also, we highlight if legacy configurations & automations need to be upgraded or even retired in favor of the latest Salesforce Lightning features & functionality.



Several specific areas that require attention:

- **Workflow Rules & Process Builders:** Check for consolidation & migration to Flow
- **APEX Triggers:** Inspect for recency, version, consolidation & migration
- **Visualforce pages:** Consider conversion to Lightning Components
- **Approval Processes:** Review for usage, accuracy & timeliness
- **Lead Conversion:** Examine for completeness & accuracy
- **Case Assignment & Escalation:** Evaluate users, groups, & OOB new features

Deliverables and Results

Deliverable 1

Documentation:

- Format: Word or similar
- Table of Contents
- Salesforce Clouds & Licenses
- User Workshops
- Data, Metadata, Integrations
- Org Comparison Visualization
- Org Merge Project Implementation Roadmap
- Future Cloud Enhancements

Tip:

The document can also serve as "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
- Org Side by Side Comparison
- Recommendations with Benefits
- Scorecard by Department/Team
- Future Roadmap by Phase with Costs
- Next Steps

Tip:

The document serves as a high-level summary of the analysis - with 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, usage, etc. We utilize this strict methodology to ensure accurate and consistent results for our clients.

Finally, most Salesforce Orgs have endured thru the years a variety of configurations due to changes in the business, mergers & acquisitions, IT staff turnover, multiple service providers, etc. Thus, it is important to highlight the key areas of success in each Salesforce Org (i.e. areas that are working properly) as well as opportunities for improvement.

About



CRM Architects: a US-based firm delivering Salesforce advisory and consulting services.

Our mission is to provide exceptional services and solutions that empower our clients. Our Architect-Led approach delivers comprehensive and expedited solutions at a much lower cost.

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