dreamforce

dun&bradstreet

6 Tips for a Successful Data.com Migration

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AGENDA

Step 1: Wait until 30 days before Renewal

Step 2: Whiteboard Your Dependencies

Step 3: Consider Your Group's Needs Only

Step 4: Install Replacement One Day before Renewal

Step 5: Send Users a Word Doc of Key Changes

Step 6: Flip the Switch and go on Vacation!

REAL AGENDA

Step 1: Leverage the Traction Tool

Step 2: Prepare and Create a Plan

Step 3: Confirm Your Business Use Cases

Step 4: Make Changes and Test

Step 5: Train Users for New Experience

Step 6: The Hard Cutover
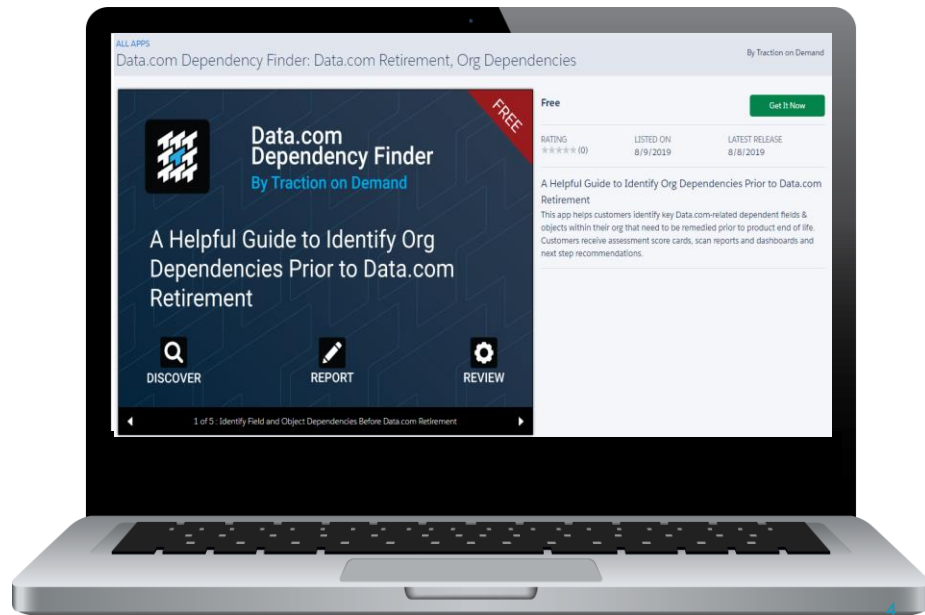
LEVERAGE THE TRACTION TOOL

#1 Download and run the Traction Data.com Data Dependency Tool

1 Traction in partnership with Salesforce created a **free tool** to help all Data.com customers understand what dependencies currently exist in their current Salesforce ORGs such as:

– Formula Fields, Validation Rules, Workflows, Triggers, Apex Classes, Data Integration Rule Field Maps , Reports

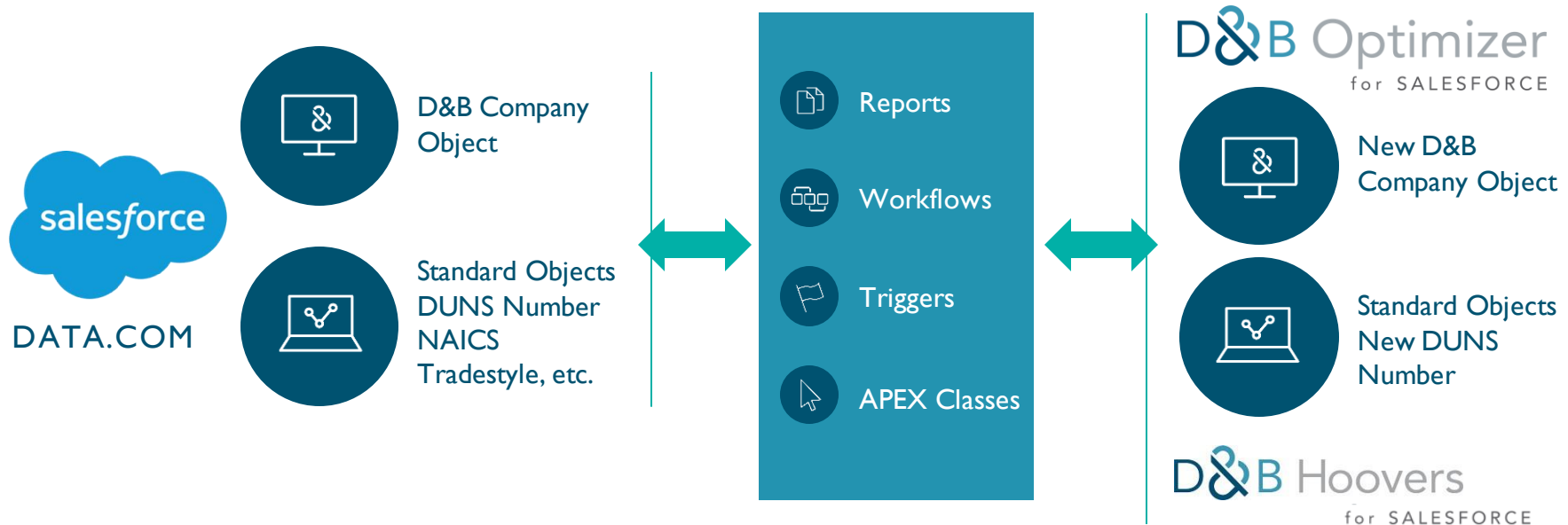**2** Summary results, resolution progress tracker, detailed scan reports and dashboard

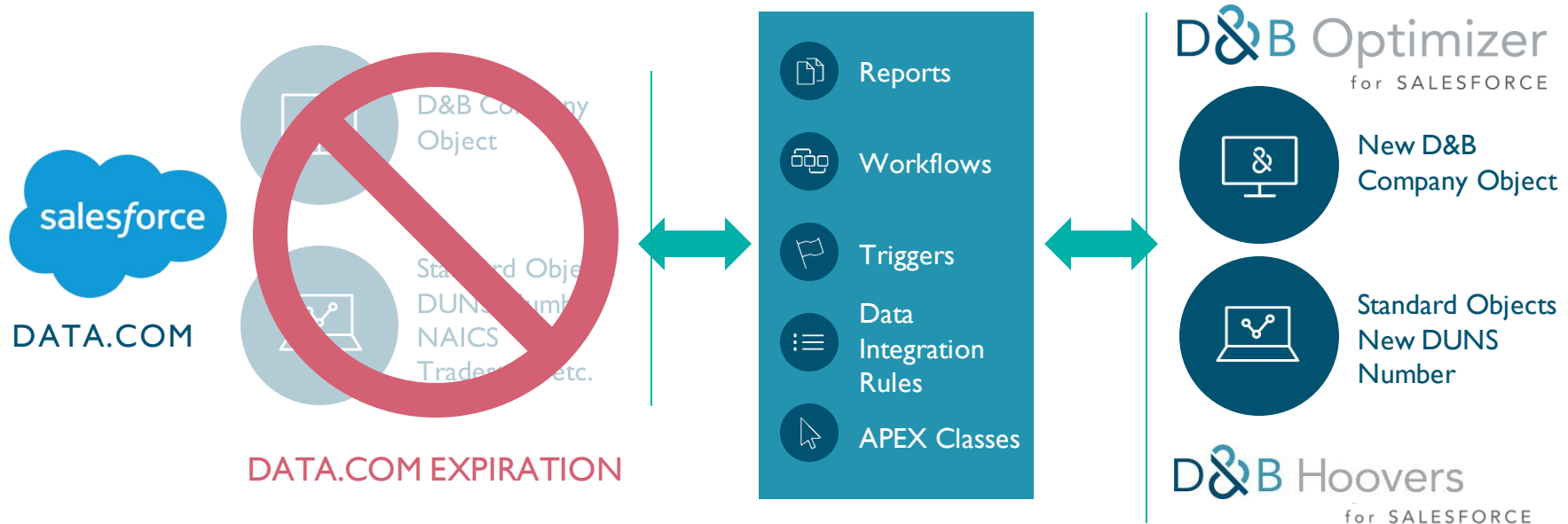**3** Recommendation Tab – resource and solution links

ALL APPS
Data.com Dependency Finder: Data.com Retirement, Org Dependencies
By Traction on Demand

FREE

Free
Get It Now

| RATING | LISTED ON | LATEST RELEASE |
| ✰✰✰✰✰ (0) | 8/9/2019 | 8/8/2019 |

A Helpful Guide to Identify Org Dependencies Prior to Data.com Retirement
This app helps customers identify key Data.com-related dependent fields & objects within their org that need to be remedied prior to product end of life. Customers receive assessment score cards, scan reports and dashboards and next step recommendations.

Data.com
Dependency Finder
By Traction on Demand

A Helpful Guide to Identify Org Dependencies Prior to Data.com Retirement

DISCOVER   REPORT   REVIEW

1 of 5 : Identify Field and Object Dependencies Before Data.com Retirement

CREATE A PLAN FOR THE MIGRATION

#2 You must prepare and create a plan, working backward a minimum of 90+ days from your Data.com expiration date

salesforce
DATA.COM

- D&B Company Object
- Standard Objects DUNS Number NAICS Tradestyle, etc.

- Reports
- Workflows
- Triggers
- APEX Classes

D&B Optimizer
for SALESFORCE

- New D&B Company Object
- Standard Objects New DUNS Number

D&B Hoovers
for SALESFORCE

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DATA.COM EXPIRATION

- Reports
- Workflows
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D&B Optimizer for SALESFORCE

New D&B Company Object

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CONFIRM YOUR BUSINESS USE CASES

#3 — Business Use Cases may have changed or may need to be re-engineered for better efficiency

What was customized in Data.com may not be necessary with the combination of:

D&B Optimizer for SALESFORCE

D&B Hoovers for SALESFORCE

Partner applications can play an important role:

Account Based Lead Management for **Salesforce**

Match leads to accounts

Enrich leads with matched data

Assign leads to the right sales rep

Convert more leads to opportunities

TRACTION COMPLETE — www.tractioncomplete.com

Transform How You Sell Into Enterprise Accounts
BY GAINING A TRUE CUSTOMER 360°

TRACTION HIERARCHIES — www.tractionhierarchies.com

MAKE CHANGES AND TEST

#4   Re-map Data, Update/Re-program APIs, Workflows, Data Validation Rules, Reports

1. **Yes, its true – Data.com cannot be uninstalled**, but it can be disabled by turning off the data integration rule and disabling the Clean batch jobs

2. Leverage the Traction Data.com dependency finder tool throughout the entire migration

3. Use the current Data.com field mappings for the mappings in D&B Optimizer Data Integration Rules

4. Data.com and D&B Optimizer both have similar custom objects and field names

5. The system admin may need to create new custom fields

6. Currently assigned DUNS Numbers will play an important role in the transition to D&B Optimizer

TRAIN USERS FOR NEW EXPERIENCE

#5 The experience using Optimizer for Salesforce will be different than Data.com Clean, and users will need to be informed on what they should expect and how to conduct their business

WHY IS THIS IMPORTANT?

The D&B Data is now updated with greater frequency and automation than Data.com

Admins will no longer require batch jobs to be executed to clean Account/Lead/Contact data

The Data.com "Clean" button is now replaced by "**Check for New Data**" button in the Lightning UI using D&B Optimizer

HARD CUTOVER TO OPTIMIZER

#6 Cutting over to Optimizer while waiting for the Data.com expiration

1 A hard-cutover approach is recommended by Salesforce (pilots running Data.com and Optimizer are difficult to conduct given that Data.com cannot be "uninstalled"

2 Once Data.com expires, all the objects associated with Data.com will be deleted

3 The Data.com report package will be required to be uninstalled prior to the expiration of Data.com

4 But before you say goodbye to Data.com: Use the Traction tool!

THANK YOU!

Visit us at our Dreamforce booth 1531 or visit www.dnb.com/datadotcom-replacement

For immediate migration support contact your Dun & Bradstreet account manager or

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CHECK OUT DUN & BRADSTREET'S SPEAKING SESSIONS AT DREAMFORCE

THURSDAY, NOV 21ST

2:00 – 2:40 PM	Transforming Sales Success with AI and Data
4:00 – 4:20 PM	Accelerate ABM Success with the Single Source of Market Truth

VISIT DUN & BRADSTREET AT BOOTH 1531