

Success story: Data migration to Salesforce for Sura



Rootstack supported Sura with the migration of his data to Salesforce in his plan to modernize his management.

About Sura

Sura is one of the most prestigious insurance companies in Latin America with a presence in several Latin American and Central American countries. Its Panamanian subsidiary is always working towards the modernization and automation of its processes, with the aim of offering its clients optimal service and a positive user experience when using its services.

Challenge

When **Rootstack** arrived at this **Sura** project, the company was in a process of modernizing all its processes, trying to improve its current management and automate many of the processes to offer better customer service. But we found this reality: they used many old technologies and various legacy systems.

In this context, **Sura** urgently needed to update its systems to enhance the management of the company and mainly to strengthen the relationship with customers, unifying its databases in a single platform, which would allow monitoring of each of the customers and contacts.

Our solutions

Then, the team of experienced software engineers from **Rootstack**, executed for Sura the migration of all their data to **Salesforce**, the **CRM** with which they decided to start managing the entire relationship with their clients in this stage of modernization of their company. Salesforce is a cloud-based software that allows you to manage all aspects of a company's relationship with

customers, with applications focused on customer service, marketing automation, among others.



We unify the data of three legacy systems

Rootstack was in charge of everything related to data governance. Sura had three different legacy databases because in the past there was a merge between Sura and other allied companies. For this reason, the data of the company's clients were found in different databases. The challenge was to unify the data of these three databases in a single source and that is what we did.

We managed to gather all the data of Sura in a single database, also called "source of truth", normalizing the data, purifying it and verifying that there was no duplicate information or redundant data, since it was likely that the data of a client was replicated across multiple databases.



We did this transformation, normalization and debugging of the data through the use of various ETLs: they took data from one format, converted it to another format while debugging and modifying the redundant data.

When unifying all the data from Sura's legacy systems in a single database or "source of truth", we made sure that it was 100% validated and verified data, that it was not outdated, duplicated, or redundant. For this, we analyze the most recent records of all the data, verifying information such as telephone numbers, addresses, identification documents, country, among other aspects.

How was the migration to Salesforce

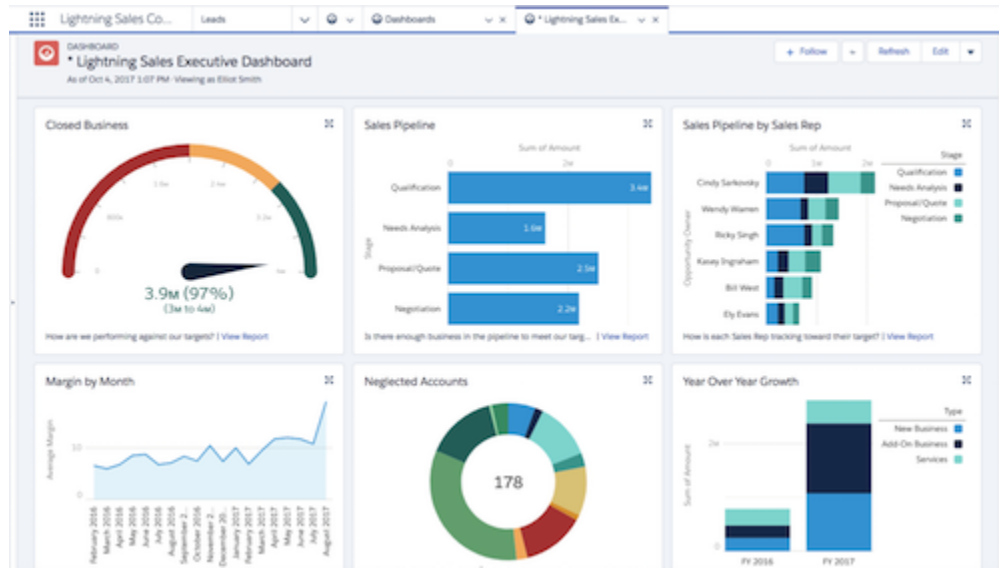
After having all the data gathered in the same source, then we execute the migration of all the validated data to Salesforce. Along with this migration came another challenge: constantly keeping Salesforce up-to-date with new information generated on the legacy systems that

Sura's customers continued to use. It was not only about migrating the old data, but also that Salesforce had the new data that was generated day after day.



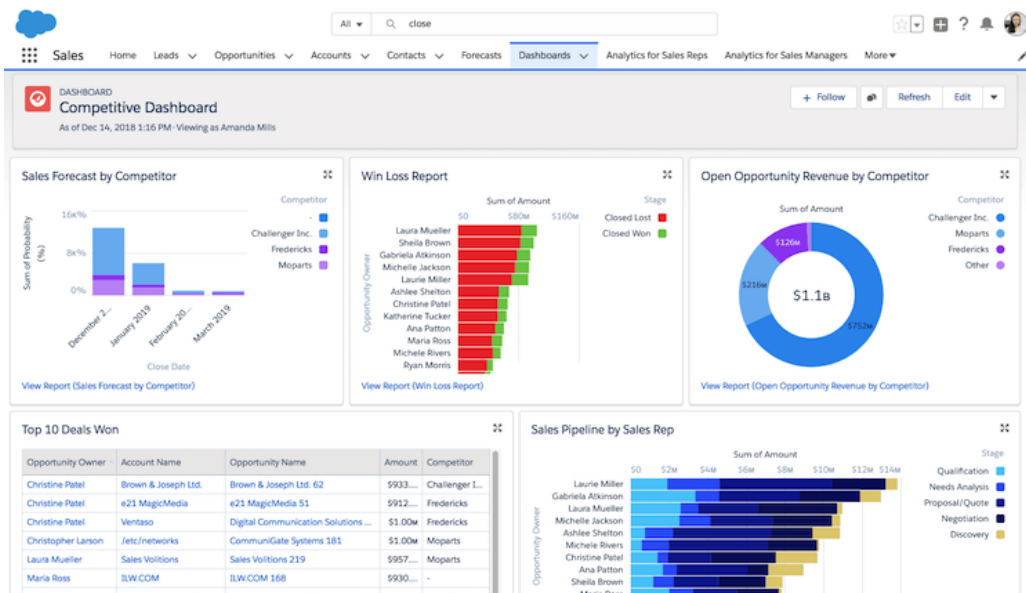
We did this through the use of web services. We add new endpoints to Salesforce so that we can decide in a personalized way how to insert and update data on this platform. Using this API expansion to Salesforce, what we did was make some scripts that took the data from the legacy databases, also from the "source of truth" and transferred it to Salesforce. This process runs periodically, it takes about a day.

To update the data in real time in Salesforce we apply another methodology. We first identified the most relevant data for the client, prioritizing which one should be updated quickly. After we entered the old Sura systems, we did a series of triggers to constantly scan that data, every 5 or 10 minutes or depending on the configuration.



Reference Image: Salesforce

In this way, if something is updated in the old system, that trigger is used to update the "source of truth", a trigger that connects directly with Salesforce so that it is updated with the most recent data that was defined as a priority. The advantage of these 'triggers' in real-time is that they allow the fast Salesforce update of certain data, for the rest of the data you have to wait longer.



The use of the ESB was key

An essential aspect in this data migration was the use of the ESB or Business Service Bus, since it had the job of coordinating all the changes in the data that we needed to execute. For example, the trigger that scanned the data in the systems communicated with the ESB and it sent the data to Salesforce. The ESB was the bridge between the databases with Salesforce since it formatted all the data before entering the CRM.

The ESB is crucial to handle the updates in real-time, without the Business Service Bus it would not be possible.

In this way, we managed to migrate all Sura data to Salesforce, modernizing its operations and streamlining all the management of its customers' information in this CRM. We have more than 10 years of experience working with clients from all over the world, creating amazing digital solutions. Start your technological transformation with us!