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ORG MERGE

Two orgs. One customer, twice.

After the acquisition: two orgs hold one customer



Org A

REGIONAL ORG

CUSTOMER RECORD

Customer X

OWNER

Sales rep 1

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Org B

ACQUIRED ORG

CUSTOMER RECORD

Customer X

OWNER

Sales rep 2

Same customer, two records, two owners

A mid-sized B2B company that grew through acquisition.

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HOW WE WORK

One customer. One record.

1



Map it

Every org, rule and owner

2



Find the overlap

Where two records are one customer

3



Decide one owner

Winning record rules first

4



Change safely

Merge in small, tested steps

Regional orgs combined into one

FROM OUR CLIENT WORK

FEWER DUPLICATES

CLEAR OWNERS

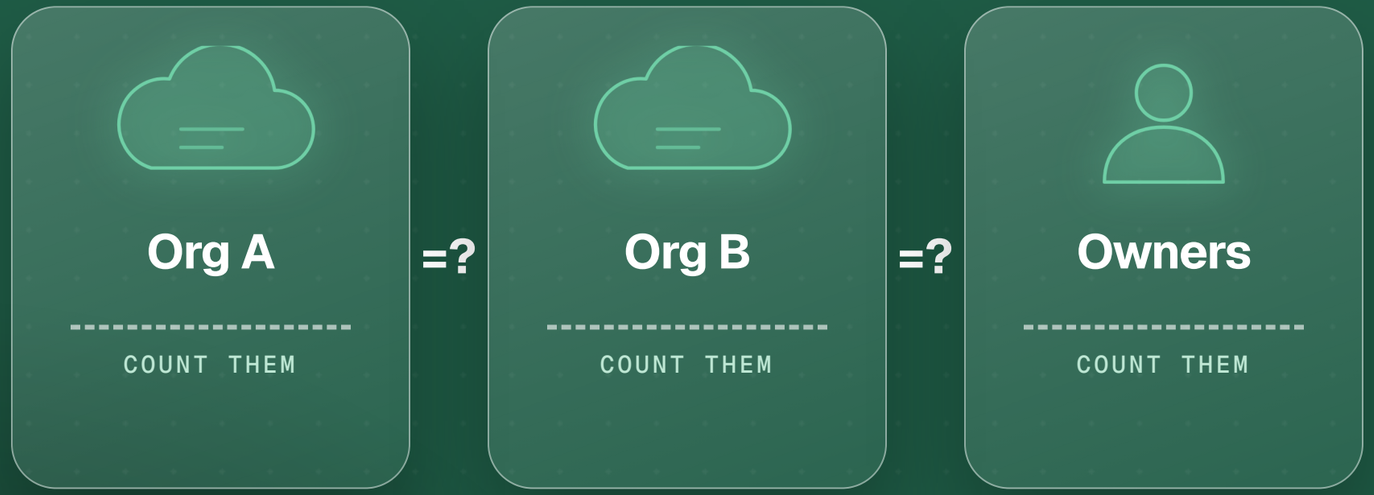
REPORTS YOU TRUST

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TRY IT THIS WEEK

Check your customers.

Pick one customer. Search for it in each org.



More than one record or owner? That is where clean-up starts.

THE ORG REVIEW

We clean up messy Salesforce orgs, merges included

$3,500

USD, FROM, FIXED FEE

- Agreed before work starts
- You keep the findings either way

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