

迈向“阿里云上的Salesforce” 医疗集团数据迁移与最佳实践

凭借自研迁移工具和个性化方案，德勤中国助力客户完成Salesforce数据和功能剥离、迁移与优化，并为中国市场打造独特的数字化业务渠道。作为Salesforce和阿里云的全球战略合作伙伴之一，德勤领跑“阿里云上的Salesforce”迁移实践，受到客户、合作伙伴与第三方认证机构的广泛认可。



关于客户

客户是拥有近百年历史的欧洲医疗集团，业务遍及全球100多个市场，年收入超过17亿欧元，进入中国市场已逾30年。客户专注影像诊断领域，以其卓越的研发实力、丰富的产品线及广泛的市场布局在医疗领域独树一帜。

客户诉求

客户总部使用的Salesforce产品在中国市场面临数据合规处理、系统响应速度、用户使用习惯等挑战，影响着跨国团队的整体工作效率。客户需要基于“阿里云上的Salesforce”实施数据剥离与整体迁移，为中国市场打造独特的数字化体验。

安全合规	性能提升	本土化需求
依照中国网络及数据安全、个人信息保护等法规要求，确保本地数据存储、数据传输、数据处理都在境内	提升数据交互效率，降低系统访问响应时间，用可扩展的解决方案支撑市场规模和大量订单需求	通过阿里云满足中国本土差异化业务需求，灵活接入即时消息、社交平台、电商等本地生态系统应用

解决方案

通过评估客户全球系统已有功能，结合国内实际业务场景中的差异化需求，以德勤自研的迁移工具和比较工具为支撑，分4个阶段实施整体迁移：

01 元数据处理	02 数据迁移	03 测试部署	04 上线运营
<ul style="list-style-type: none">中国特定元数据全流程处理系统集成与复刻	<ul style="list-style-type: none">确定数据结构、范围和模板利用德勤自研工具进行整体数据迁移和比对	<ul style="list-style-type: none">利用差异化用例在各阶段进行全面的比较测试采用并行方案进行数据验证	<ul style="list-style-type: none">确定标准化上线运行机制系统切换后提供持续支持模型及监控

项目成果

梳理**40+**个业务场景，剥离出**300+**个对象，迁移**12000+**个字段，**3000万+**条中国区专属数据，覆盖**200+**本地用户，实现数据处理全流程在国内进行，确保系统**安全合规**

迁移后，系统页面更简洁，加载时间缩短，用户体验更友好，**团队工作效率提高**；Salesforce与第三方集成更加顺畅，为构建灵活的**中国区数字化业务生态**打下基础

为中国区开发用户地图拜访、权限逻辑调整等**自定义功能**，并将进一步部署出行、即时通讯、会议管理、经销商管理等应用集成

德勤 | Salesforce

德勤拥有全球领先的Salesforce实施团队，持续引领跨国企业在中国市场的数字化升级与转型。借助Salesforce在销售、服务、商务、营销等领域的优势，德勤致力于帮助跨国企业适应中国市场变化，为其量身打造具有中国特色的解决方案，构建全链路CRM体系，助力企业在中国市场实现高质量、可持续的业务增长。

敬请联络德勤：

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我们诚信为本，坚守质量，勇于创新，以卓越的专业能力、丰富的行业洞察和智慧的技术解决方案，助力各行各业的客户与合作伙伴把握机遇，应对挑战，实现世界一流的高质量发展目标。

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Ecosystems & Alliances | Client Success Stories

Moving to "Salesforce on Alibaba Cloud" Data Migration and Best Practices for a Healthcare Group

Leveraging proprietary migration tools and tailored solutions, Deloitte enabled the client to successfully separate, migrate, and optimize Salesforce data and functionalities, while establishing a unique digital business channel for the Chinese market. As a global strategic partner of both Salesforce and Alibaba Cloud, Deloitte is pioneering the "Salesforce on Alibaba Cloud" migration practice, earning wide recognition from clients, partners, and third-party certification bodies.



About Client

The client is a European healthcare group with nearly a century of history, operating in over 100 markets worldwide and generating annual revenue exceeding €1.7 billion. In China for over 30 years, the client specializes in diagnostic imaging and is recognized for its innovation and market leadership.

Requirements

The client faced data compliance, system latency, and usability challenges with its global Salesforce instance in China, impacting cross-border team efficiency. To address these, they initiated a data separation and full migration to "Salesforce on Alibaba Cloud" to build a tailored digital experience for the Chinese market.

Security Compliance

Ensure data storage, transmission, and processing comply with China's cybersecurity and data protection laws.

Performance Enhancement

Enhance data exchange efficiency, reduce system response time, and scale to meet growing market demands and high order volumes.

Localization Requirements

Leverage Alibaba Cloud to meet local needs and seamlessly integrate with local ecosystems, including messaging, social, and e-commerce platforms.

Solution

By assessing the client's global system functionalities and aligning them with China's specific business needs, Deloitte leveraged **proprietary migration and comparison tools** to execute the end-to-end migration in four phases.

01 Data Processing

- **China-specific** metadata end-to-end processing
- System integration and replication

02 Data Migration

- Define **data structure, scope, and templates**
- Execute data migration and validation using **Deloitte's proprietary tools**

03 Testing Deployment

- Conduct comprehensive comparison testing across all phases using **differentiated use cases**
- Validate data through a **parallel validation approach**

04 Live Operations

- Establish **standardized go-live operating procedures**
- Provide post-cutover **support model and continuous monitoring**

Outcome

Mapped **40+** business scenarios, decoupled **300+** objects, migrated **12,000+** fields and **30M+** China-specific records, covering **200+** local users — enabling end-to-end domestic data processing and ensuring system **security and compliance**.

Post-migration, the system features a cleaner interface, faster loading times, and improved user experience, **improving team productivity**. Seamless Salesforce integration with third-party applications lays the foundation building a flexible **China-region digital business ecosystem**.

Developed **custom features** for China region, including user journey tracking and permission logic adjustments, with further integration of travel, instant messaging, meeting management, and dealer management applications.

Deloitte | Salesforce

Deloitte has a world-leading Salesforce implementation team, continuously driving the digital transformation and modernization for multinational enterprises in the Chinese market. Leveraging Salesforce's strengths in sales, service, commerce, and marketing, Deloitte helps multinational enterprises adapt to the dynamic China market by designing China-specific solutions, building end-to-end CRM capabilities, and enabling high-quality, sustainable business growth in China.



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