

Requirements Gathering Session: Legacy System to Salesforce Migration

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Participants:

- Sarah Chen (SC) - Salesforce Solutions Implementer, CloudPath Solutions
 - Michael Rodriguez (MR) - Director of Sales Operations, Meridian Manufacturing
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SC: Good morning, Michael. Thank you for making time for this requirements gathering session. Today I'd like to walk through your business needs as we prepare to migrate from your legacy system to Salesforce. My goal is to understand your current processes, pain points, and what you need the new system to accomplish.

MR: Morning, Sarah. Happy to get this moving. We've been using our current system for over a decade, and it's really showing its age. The company has outgrown it.

SC: I understand completely. Before we dive in, could you give me a quick overview of your current system and its main limitations?

MR: Sure. We're using an older ERP called ManufacturePro that we've customized heavily over the years. It handles our inventory, some basic CRM functions, and our order processing. The biggest issues are that it's slow, doesn't integrate well with our other tools, reporting is a nightmare, and making changes requires expensive consultant time.

SC: That's helpful context. Let's start exploring your specific requirements. I understand one key need is to catalog all your products and SKUs in the new system?

MR: Yes, that's crucial. We have about 1,200 different products across 8 product lines. Each product has multiple SKUs based on variations like size, color, material, etc. In total, we're looking at around 5,000 SKUs. Our current system makes managing these extremely cumbersome.

SC: Could you walk me through what information you need to track for each product and SKU?

MR: For each product, we need to track the product name, description, product line, category, subcategory, and various specifications. For SKUs, we need the unique identifier, base cost, list price, markup percentage, and availability. We also need to track which products can have discounts applied and what the maximum discount percentage is for each.