

# CRM Action Profiles → Service Cloud V2 Migration Blueprint

A repeatable migration pattern to convert legacy CRM Action Profiles into Service Cloud V2 flows with parity, testability, and safe cutover.

## Problem

Legacy CRM action engines contain undocumented rules and custom code; manual reimplementaion is time-consuming and error-prone.

## Solution

A disciplined migration approach: extract and canonicalize action rules into an event-condition-action model, transform into Service Cloud V2 flows and CPI adapters, validate via replay tests, and cut over with canary routing.

## 5-step Implementation

1. Inventory: extract action definitions, templates, bindings, and traces
2. Canonicalization: convert to ECA contracts and tag custom code
3. Transformation: generate Service Cloud V2 flows and CPI artifacts
4. Validation: run replay tests and produce parity reports
5. Cutover: staged canary with reconciliation and fallback

## Key KPIs

- Migration effort reduction: target ~40% vs manual rewrite
- Rule parity: target ≥98% for critical rules
- Post-cutover incidents: under 5% of historical rate

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