Case Study

One of the World's leading Semiconductor Companies achieves end-to-end process automation with Oracle Sales Cloud Account Merger

Client: Lattice Semiconductor   **Industry:** Semiconductors

Lattice Semiconductor saves time, achieves efficient Customer Hierarchy transition, and a robust application with less error probability with the sales Cloud Account Merger process automation.

About the Client

Lattice Semiconductor Corporation is an American manufacturer of high-performance programmable logic devices (FPGAs, CPLDs, & SPLDs). The company has more than 700 employees and annual revenue of more than $400 million as of 2019. In 2011, the Oregon-based company was ranked third among the World's leading makers of field programmable gate array (FPGA) devices and second for CPLDs & SPLDs. Founded in 1983, the company went public in 1989 and is traded on the NASDAQ stock exchange under the symbol LSCC.

Products & Services

• FPGAs

• CPLDs

• SPLDs

• ASSPs

• CrossLink-NX

The Solution

• Flag all the Accounts that are Merged with or Acquired by some other Account.
• Identify all the modules that need automatic update due to Account Merger- Account Split, Opportunity, Quotes etc.
• Create automatic mass update groovy script for each module, i.e., Account Split, Opportunity, quotes etc., to update Parent Account information.
• Schedule all the Parent Account update scripts synchronously at the end of the day of PST hours.
• Once Parent Account information is updated on each module, flag-off the Account using a script to avoid reprocessing the scheduled job.

Business Requirements

Account Merger-
• An account is a term in sales business that represents a potential/passive Customer associated in business with Lattice Semiconductor or likely to do business. This automation is for Customers who are already in business with Lattice Semiconductor. We will refer to Customer as Accounts sometimes across this article.
• This is a widespread scenario when a business is acquired or merged with some other company. In Lattice Semi business it is called as Account Merger.

Account Merger Subsequent Processes-

- Lattice Semiconductor only manages the Customer hierarchy to one level, that is, Parent and Child. When an Account is Merged or Acquired, certain entities should be assigned to the new Parent Organization hierarchy.
- Account Split, Opportunity, Quote, etc., are the modules with multiple felds containing Parent Account information. In the case of an Account Merger, such information should be updated with the new Parent Account.

Business Challenges

- Updating the Parent Account using Excel file-based data load.
- File-Based data load usually take hours to prepare the data in a specific import template and load.
- The file-Based process is a manual, unreliable, and inefficient way to manage Corporate Merger related changes.
- Such a critical process should be automated, and all the related changes should be taken care of by application rather than manually

Use Case Example

At a certain point, suppose YAMA CORPORATION acquired AD-TECH INTERNATION INC. This information will be captured in Owned by field to notify the application that all the entities assigned to AD TECH INTERNATION INC. should be assigned to YAMAHA CORPORATION.

Lattice Sales Representative/ Sales Manager managing AD- TECH INTERNATIONAL INC. should receive an email notification about the merger. If he agrees, then he would let it be. Otherwise, he can undo the changes before the end of the day.

One of the modules that are going to be impacted is Account Split. Suppose currently 4 records are having AD-TECH INTERNATIONAL INC. as Design Standard Customer. They should be updated with the new Parent YAMAHA CORPORATION. This is how they look before an Account Merger.

The scheduled job will crawl All Customers that have been flagged as Merged. It should pick AD-TECH INTERNATIONAL INC. and update all the related records from related Modules (for ex. Account Split) with YAMAHA CORPORATION.

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Business Benefits

The sales Cloud Account Merger process is an automation process that has considerable merits, including but not limited to time-saving, efficient Customer Hierarchy transition, robust application with less error probability.