

Securing a seamless Oracle Siebel CRM migration with expert QA & testing



When a major utilities provider faced challenges upgrading its legacy Oracle Siebel CRM system, Assurity Consulting stepped in, delivering the necessary robust quality assurance and testing for a successful outcome. By addressing complex customisations and integration issues, Assurity supported the delivery of a seamless migration to the current version of Oracle Siebel, moving from on-premises hardware to the AWS cloud. As a result, a client which has the software at the centre of its operations has maintained customer engagement and operational efficiency without disruption.

Results

Ensured a seamless go-live with negligible disruption to critical business operations.

Delivered a stable, secure, and future-ready cloud CRM platform, migrating from on-premises hardware.

Secured major cost savings by avoiding punitive legacy licensing fees.

ASSURITY

About

Organisation

A leading utilities provider

Sector

Critical infrastructure

Solution

Quality Assurance & Testing

The client is a leading national utilities provider, whose services support thousands of customers. Its central Oracle Siebel CRM system is used by thousands of internal staff to manage the entire customer lifecycle – from initial connections and fault logging to ongoing support and engagement.

Challenges

The utilities provider, a long-standing client of Assurity Consulting, set out to modernise its Siebel CRM system, originally installed over 20 years ago, before Oracle acquired the platform. Although the software had received periodic updates, it was still running on an outdated on-premises version that significantly lagged behind current standards.

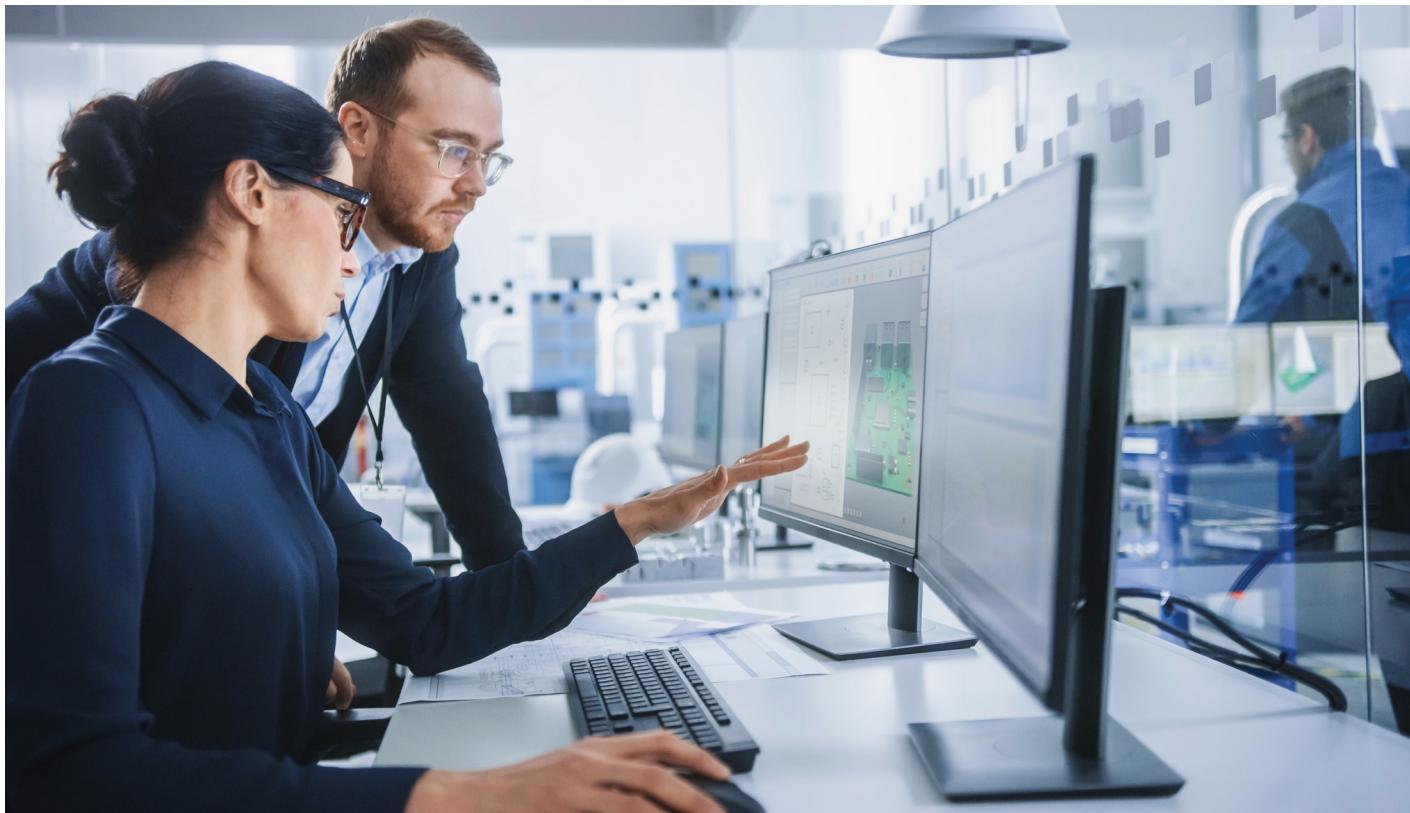
Complicating a multi-version upgrade, the system was deeply embedded in the business's operations, with a raft of customisations and integrations with various enterprise applications. Predominantly used as a CRM, integration layer, and ticketing system, Siebel supported critical processes directly touching the provider's thousands of customers. In fact, the system is central to the start and finish of every customer journey, and nearly everything in between.

The upgrade to the current version, combined with a move to AWS cloud, was driven by multiple defects and shortcomings in software which was designed for a different time. Added to that, the limitations and overheads of on-premises software and hardware were being felt, including a looming risk of excessive licensing fees.

Challenges included managing and validating extensive customisations, which in effect created an enormous amount of technical debt, complicating multi-version upgrades. Integration with core ERP systems, plus multiple external vendor dependencies, demanded a rigorous approach to testing and QA.

However, as is often the case, initial planning underestimated testing coverage and scope, with Assurity Consulting brought in when the inadequacy of resources became apparent, jeopardising a planned May 2025 go-live.





Solution

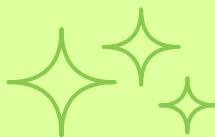
Assurity implemented a comprehensive testing strategy and plan focusing on integration, performance, and user acceptance. Engaged in January 2025, Assurity's technical test principal consultant, supported by internal teams, led a lean effort despite budget constraints. Starting from a point of 'You are it', the principal consultant quickly demonstrated the necessity for added resources, expanding the team and delivering a detailed program supporting a quality software installation. This included:

- **Process-Based Testing:** Created test cases for core workflows while maintaining customisations.
- **Integration Testing:** Validated endpoints ERP, and other third-party vendors, validating integrations and associated workflows.
- **Performance Testing:** Conducted in two phases, including site reliability testing across AWS zones, to ensure data preservation in the event of connection failures.
- **User Acceptance Testing (UAT):** Collaborated with business teams and updated test cases to reflect changes.

Assurity leveraged the client's DevOps model, where developers own the code and run unit tests, enhancing collaboration. Workshops with teams, including customer excellence and developers, ensured alignment across business units, addressing complexities such as batch jobs and file transfers, while introducing and preserving the voice of the customer.



Results



While it was brought in later than ideal, as Assurity Consulting favours a shift-left model where QA and testing are included from the project design phase, the project was a model of collaboration and can-do, supporting the delivery of a stable, future-ready platform. Most importantly, the go-live had a negligible effect on business-as-usual.

The stable Oracle Siebel CRM upgrade went live without any significant glitches. While defects in large-scale projects are inevitable, identifying and resolving just 20 issues was well within expectations in a system with thousands of internal users and customer-facing processes.

Assurity's process-based testing and DevOps collaboration, along with risk-based approaches, ensured workflows, like connections and campaigns, functioned seamlessly. Ongoing support established a testing framework for future upgrades, with early planning retained as a lesson learned for future endeavours.

The project also delivered a significant financial benefit, as the timely decommissioning of the on-premises system meant the client successfully avoided punitive licensing fees.

The result of a controlled and well-executed quality assurance approach has enabled the utilities provider to operate a secure, modern, cloud-based CRM, enhancing customer engagement and operational resilience. The system is rapidly maturing and ready to deliver lasting value today and into the future.



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