



CLOUD INTEGRATION



Modern IT shops are a mix of on-premises (legacy) applications and cloud applications

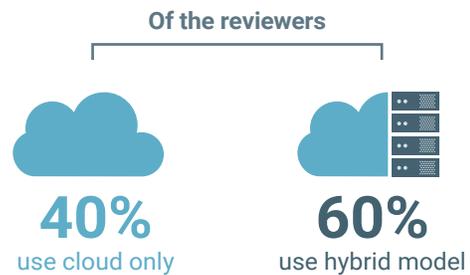
Most companies, including SMBs, use two or more software solutions to manage business operations. All these companies need to transfer data between solutions in order to ensure that they have a single source of the truth.

Companies that invested in IT personnel and infrastructure tend to use FTP transfers, automated export/import, data warehouses, etc. All these options only provide partial integration between systems, leaving some business needs uncovered.

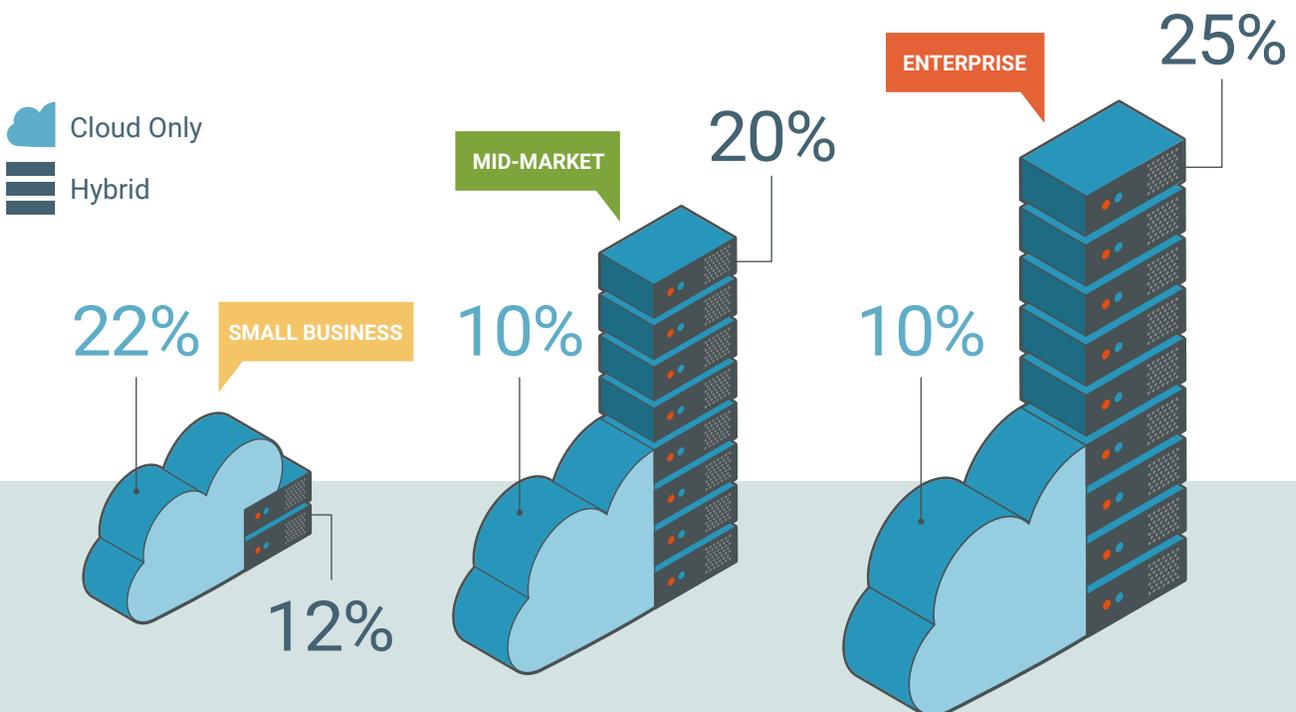
"I was able to automate several processes which involves integration with Salesforce, SuccessFactors, NetSuite, ViewCentral and many more third party vendors which otherwise would have caused a lot of manual effort and would have been more error prone."



Of the reviewers of integration software who mentioned what delivery models their company uses, 60% have a hybrid model that combines cloud and on-premises and 40% use cloud solutions only.



Even though small companies are more likely to use cloud and larger companies to have a mix of cloud and on-premises, companies of all sizes see integration as an important business advantage.



Lack of integration causes processes to break down or take longer, or necessitates manual steps to bridge the silos

When they can't rely on integration, companies have two choices: either enter data manually into multiple systems, or export data from one system and import it into others. Both options are error-prone and time-consuming, which impacts the integrity of the data and the productivity of the users.

Even though small companies are more likely to use cloud-only, and larger companies more often utilize a mix of cloud and on-premises, companies of all sizes see integration as an important business advantage.

"We receive and processes large amounts of data from a broad spectrum of sources. With growth in business came the realization that data volumes would ultimately outpace their manageability. We now pull files from a secure FTP server, decrypt, stage, transform and load them to our SQL databases without the need for human manipulation. This significantly reduces the time required to process data, and the data itself is inherently more secure. Analysts can spend more time turning this data into usable information."



"We needed a systematic approach to push data to hundreds of fields (and manipulate them in the process) when processing our customers' orders."



"There are several data points that are captured about individual webinar attendees, and it can be cumbersome to download and upload this data into a marketing automation platform."



"Integrating different systems including ERPs, CRMs, queues, databases, and APIs lying on cloud/on-premises."



Finance

Lack of integration can have a negative impact on the efficiency of the accounting department and the profitability of the business. In the first case, accountants need a lot of time to pull data from separate systems, consolidate it, and import it in the accounting system. This usually leads to complicated processes every time a fiscal period needs to be closed, which can also impact other departments, as well as customers and suppliers.

“Automation of EDI delivery and invoice processing has saved lots of manual work. The logging and documentation of these integrations has allowed for improved efficiencies and improved auditing.”



From a profitability perspective, integration is essential to address the following challenges:

- ▶ Calculate the costs of the goods and services sold by the company, including determining profit margins, prices, and discounts (all this information can be spread across multiple systems such as sales tools, inventory management software, accounting packages, or ERP)
- ▶ Match sales or purchasing quotes and orders with invoices and payments to avoid receiving or paying inaccurate amounts, which can generate profits that cannot be justified using accounting principles (typical systems that need to be integrated in this case are CRM, quote to order, billing, accounting or ERP)
- ▶ Have the ability to identify the most profitable products and services sold by the company, usually due to inaccurate sales statistics, and the two challenges mentioned above

Accounting Review Statistics

12% of accounting reviewers said that one of the things they like is the ability to **integrate and connect with other solutions, and consolidate data**

8% declared that integration and data consolidation is one of the **main business benefits they achieved**

Those who consider integration to be important are:

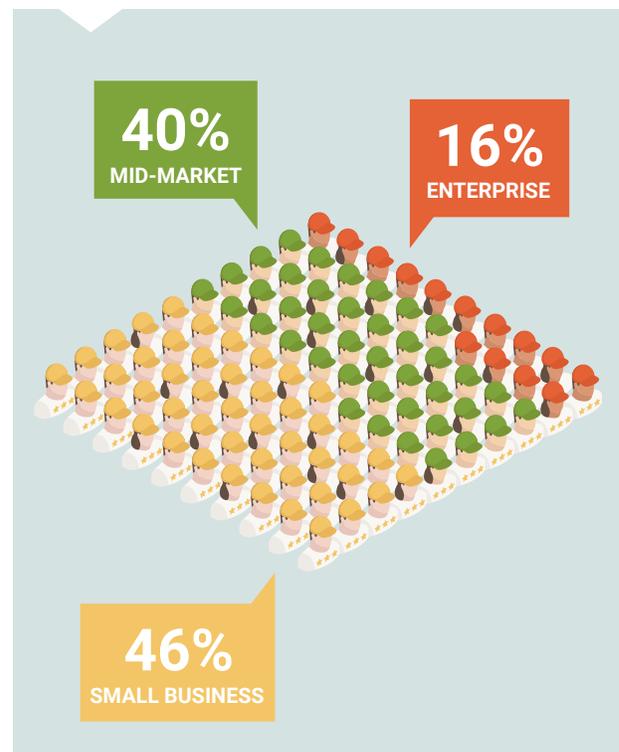
▶ more likely to recommend the solution with an average NPS score of: **8** vs **7.5** for others

▶ more likely to think that the product is headed in the right direction: **80%** vs **73%** for others

From an ROI perspective:

ROI was achieved within a year more often by those who think integration is important: **56%** vs **46%** for others

Distribution of reviewers by company size:



Customer Service

Customer satisfaction can also be impacted by a lack of integration between multiple systems such as CRM, field service management, call center software, knowledge management solutions, or online portals (including e-commerce).

“Capturing data is now a pleasure and affords us more time to focus on customer service rather than data capturing.”



Some of the most important **challenges to be addressed through integration** are:



Product information and availability should be consistent across all systems, both internal and external.

This avoids overbooking, ensuring that customers get the products and quantities they ordered, and streamlines processes from order management to picking and shipping. Customers are therefore less likely to have unpleasant experiences like delays, receiving the wrong product, being overcharged, etc.



Customer profile and interactions history help customer service, sales, and marketing better understand the customer,

which helps them provide a personalized experience. Customer service can respond faster, and sales and marketing can approach customers based on what they really need.



Contracts and Service Level Agreements include clauses, terms, and conditions that are needed

by systems like sales management, accounting, or shipping. This ensures that the company follows the agreements with their customers, which can increase loyalty and may provide opportunities for upsell or cross-sell.



Problem-solving is essential for customer service and field service employees

who are faced with problems and unhappy customers. In order to address issues quickly and efficiently, these employees need access to product technical specifications and knowledge-based solutions, or ways to approach common problems. The initial negative customer experience can thus be converted into positive feedback and can even increase loyalty.

“Cross-selling and upselling - Selling an additional product or service to an existing customer or suggesting more expensive items to a customer making a purchase after understanding customer interest and purchase trends.”



“Service automation - Deliver excellent customer service, maintaining quality.”



CRM Review Statistics

15% | of reviewers mentioned integration when answering the question "What do you like best?"

Reviewers who mentioned integration as the attribute they like best are more likely to think that the product is headed in the right direction:

5% | mentioned integration as being a business problem solved or benefit realized

10% | said integration was one of the reasons they switched to a new CRM

Based on 9,161 reviews of CRM software



80%
used CRM
in the cloud



20%
used CRM
on-premises



Likelihood to recommend based on **whether respondents mention integration:**



Sales & Marketing; Time Tracking

Marketing and sales professionals end up using multiple solutions because they either cannot afford a complete CRM solution or they have specific needs that aren't covered by CRM, such as sales intelligence or marketing content management. Not to mention, ERP tools usually don't provide more than basic CRM functionality. It is not unusual that marketers would use Outlook or Gmail for communication, Mailchimp for email marketing, basic CRM for contact management, and ERP reports to see who bought what, how often, etc. Trying to match all this information manually is completely inefficient and the tools mentioned provide integration options that aren't always compatible and require programming.

The only way to address this issue is to use an integration framework that provides out-of-the-box connectors for dozens of software solutions, as well as the ability to easily create and modify new APIs.

"Integration with multiple marketing platforms. Lots of development hours gained back since we don't have to learn the API plumbing of the underlying marketing platform."



"Integrate CRM tools with marketing automation tools when a native integration does not exist in either platform."



Time tracking is an important challenge for both manufacturing and professional services companies. In both cases, employees either keep track of their time manually or in spreadsheets, or use some kind of device or mobile app. All this information needs to be imported into an HR system to manage attendance and calculate payroll, then to an accounting system or ERP to process payments and calculate the cost of labor.

If this information doesn't get transferred properly between systems, employees may not get paid for their work, the allocation of labor to the cost of products may be inaccurate, and the company may not be able to tell which employees are the most effective, which can have an impact on employee satisfaction.

"For payroll kind of data, we are able to send the data daily, or by using API management, we are able to send the data in daily or hourly basis."



Payroll, Time Tracking, and HR Review Statistics



Payroll:

26%

of reviewers mentioned that time tracking and management is one of the features they like most in payroll



Time Tracking:

10%

consider that improved payroll is one of the business benefits of using time tracking software

8%

said integration is one of attributes they like best about time tracking software



HR Management:

15%

consider integration and centralized information to be the main benefits of HR management solutions

10%

mentioned the lack of integration and centralized data are things they don't like



Core HR:

6%

say, integration is something they dislike

10%

consider integration, consolidation, centralization, or connected systems as representative of an important business benefit



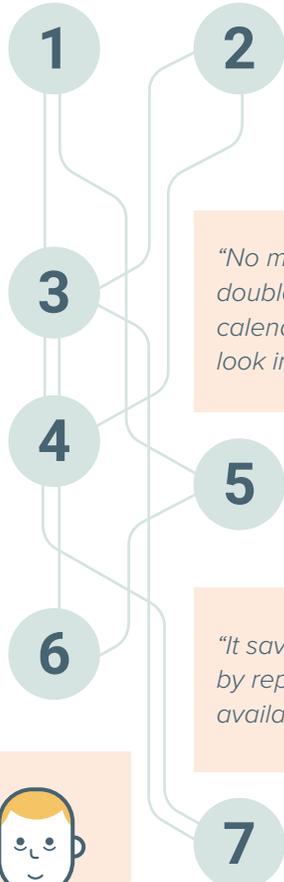
Benefits of Integrated Systems

Everyone has the same information, including employees, customers, suppliers, contractors, etc. For e-commerce or online orders, everyone involved can see the information about the customer, including shipping and billing addresses, payment terms, and credit history.

A change in one system can be reflected in all other systems – for instance a product discontinued in ERP cannot be sold, bought, be available in inventory, or manufactured

Ensures compliance in heavily regulated industries such as food manufacturing. Integration makes it easier for companies to find information for traceability purposes and quickly address issues like recalls of contaminated food.

Data consistency or standardization increases the accuracy of the information and simplifies data management.



There is no need for manual data entry, import and export of data, and the use of spreadsheets. A typical example of double entry is when each department uses its own calendar for activities and there is no synchronization between them.

“No missed appointments, no double bookings anymore. My calendar manager only needs to look in one calendar! Perfect!”



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Lowers IT costs by replacing costly data warehouses or in house connectors that need to be updated for each new version of the solutions with which they are used.

“It saves heavy cost and effort by replacing long codes with available connectors.”



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Increased productivity for both IT personnel and all other employees. The time and effort needed to find information can be reduced, which allows employees to focus on what matters most.

“We use DataDog to display data from within the company. We’ve been able to see results quickly, which increases our ability to be more productive.”



“The data feeding into our systems is more standardized and patterned because it is put there through automated ETL.”

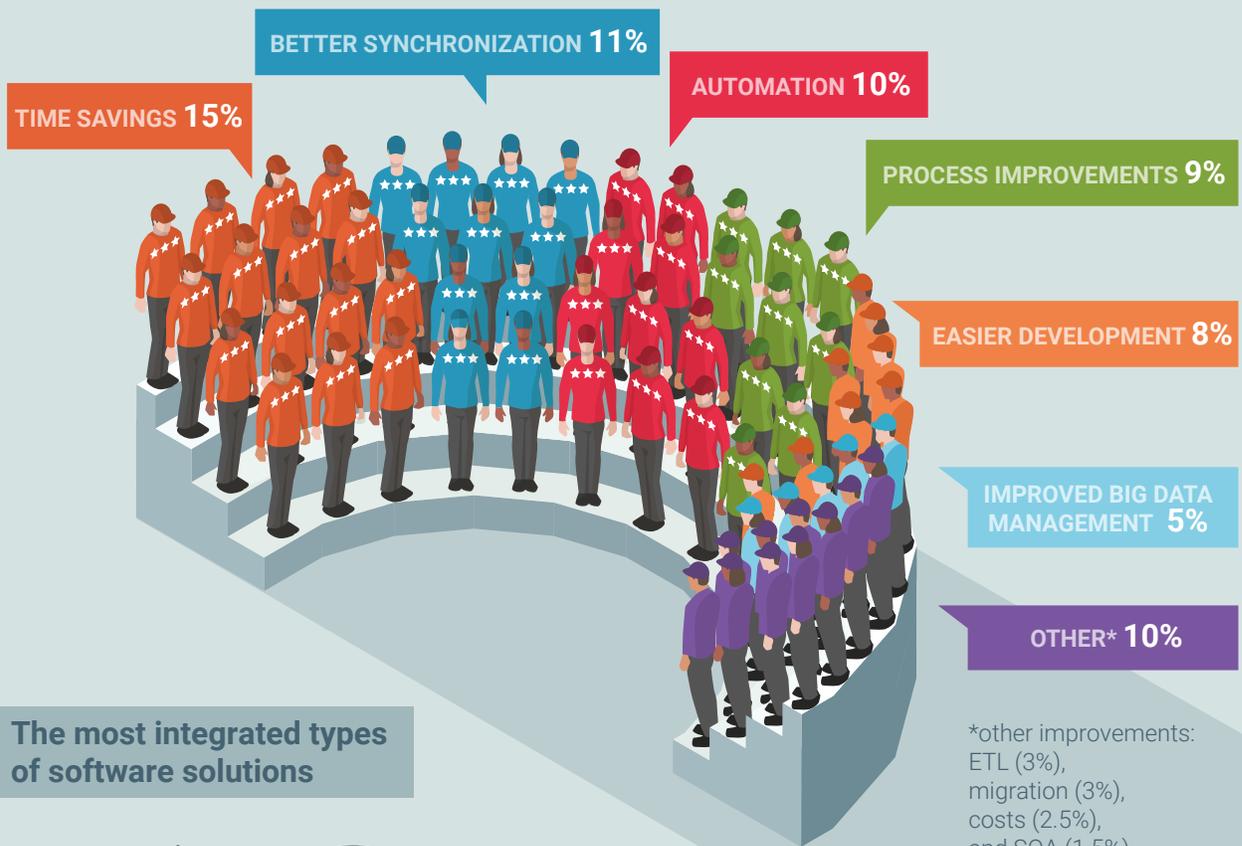


Integration Software Review Statistics

What reviewers like most about integration software



The main business benefits mentioned



The most integrated types of software solutions



Success Metrics

"We've reduced the amount of time to add new connections from weeks to days."



ROI

Crowd data shows the ROI of software solutions for integration can be as high as 20%. This is explained by a low implementation timeline (almost 2 months on average) and by the technical and business advantages mentioned above.



20% ROI
2 months implementation timeline

Time Saving

Another way to measure the success of an integration solution is to determine the time that IT teams saved by using it. Almost 16% of respondents indicated that they spend less time managing different systems after they implemented software for integration. Time savings can vary from days to "hundreds of hours of work each year" (as mentioned by a reviewer).

16%
spent less time managing different systems



Ease of Use

Finally, in order to be efficient, a software solution has to be easy to use. 13% of reviewers mentioned simplicity and ease of use as being one of the most important advantages of an integration solution.



13%
mention ease of use as important