Put It Forward®

Integration Guidebook

Approaches to a successful integraton project - Parts 1, 2 & 3

“If we have data, let‘s look at data, if all we have are opinions - let‘s go with mine.”

Jim Barksdale, former CEO Netscape

INTRODUCTION

CIO'S SAY THAT "FIT" ENTERPRISE WILL WIN WHEN BUSINESS CONDITIONS TURN

The Gartner 2020 CIO Survey reveals that in the past four years, **90% of enterprises have experienced a turn that upset normal operations**, such as severe operating cost pressures, political upheavals, leadership turnover, adverse regulatory interventions and so on. **Only a quarter of enterprises are fit enough to come out ahead of the turn**, according to Gartner.

The survey separated CIO respondents' enterprises into two groups, "fit" and "fragile," depending on how they fared in their last turns. Fit enterprises emerged from their turns stronger in capabilities such as funding business initiatives and attracting the right talent, while fragile enterprises emerged less capable in these areas. Fit enterprises, on average, also increased their revenue by 5% per annum over the past three years, faster than the 3.5% per annum revenue increase for their fragile peers. Source 2020 Gartner CIO Guide

In this Integration Guidebook, we discuss the importance of enterprise integration and how it is more than just connecting data sources, but rather, it is integrating data with the users (people) and systems in a cohesive bi-directional flow - providing improved business processes, analytics and governance across your organization to achieve a digital ecosytem. In the first part of our guide we discuss the stages of integration maturity for an organization - and the actions needed to move beyond the basic level. Later, we share best practices and how to successfully start your next integration project.

> *"Any enterprise CEO really ought to be able to ask a question that involves connecting data across the organization ...*
>
> Tim Berners-Lee

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1 STAGES OF INTEGRATION

WHERE ARE YOU?

STAGES OF INTEGRATION MATURITY

BASIC

Believe it or not 80% of most organizations are at the Basic level of data integration. Probably experiencing weekly if not daily frustrations with internal communication, project delay and team inefficiencies.

1

MANUAL OR SEMI-AUTOMATED DATA INTEGRATION

Almost everybody in the organization feels the pain of this - as it requires much of the day to re-enter data from one system to another, sometimes not even getting the right information to the right system, all together - decreasing productivity but also increasing frustration.

2

DATA INCONSISTENCIES

With manual data entry, comes information that is fragmented and inconsistent across many different applications. Each department stores and manages data and documents on its own, choosing their own disparate technology. Evidence of data quality issues are persistent but largely not addressed with exception of sporadic manual intervention.

3

NO GOVERNANCE

The biggest effect to the organization is the lack of information governance, security or accountability of key information assets.

The Result? The business as a whole is unaware of how much is actually spent on information because of the disjointed spend; project by project. And the organization makes strategic decisions based on inadequate data.

Action Needed: Planners and architects should approach business leaders on the potential value of data integration across the enterprise and also the potential risks of not taking this step, especially legal and compliance issues. **Our Solution Engineers can give you the tools needed to present this to the right people at the right time.**

MANAGED

Business units realize the value of information and share it on cross-functional projects but don't yet see the need for this enterprise-wide coordination of data.

1

SINGLE TASK SYNCHRONIZATION

A single task being represented in multiple systems and processes is beginning to emerge but tasks are not fully synchronized across the enterprise.

2

STANDARDIZED INTEGRATIONS

The organization is starting to integrate data in standardized ways but not across the enterprise. It remains localized and redundant, with primarily only point-to-point integrations - addressing integrations as needed, as opposed to looking at the needs of the organization as a whole.

3

BASIC PROCESS DESIGN

Evident in this stage are centralized tools for management such as data access and process design. There are some design principles coupled with centralized management oversight.

The Result? The organization has gone from something disorganized that is more consistent and a little bit more predictable; making it is easier to plan. However, there are still data quality inconsistencies and pockets of manual intervention.

Action Needed: Top management should share the need for more comprehensive data integration to address cross-functional issues and compliance. While planners and architects should prepare common scenarios and use cases for integration.

COMPETENCY

The organization perceives data as necessary for improved performance - moving from a project-level information management to more enterprise wide data sharing.

1

REPEATABLE AND SCALABLE INTEGRATIONS

As data sharing transfers from a project level to more enterprise wide, the introduction of repeatable and scalable data management processes are seen as business enablers and viewed as necessary to improve business performance.

2

MULTI-INTEGRATION INTERVALS AND ENDPOINTS

As the organization starts adopting the idea of enterprise-wide data sharing, so comes the need to look at integrating more than a couple of systems in a point-to-point approach. But rather, what is needed is more of a network or integration middleware to connect all the systems cohesively.

3

DATA QUALITY MANAGEMENT

There is data proliferation across the organization with coordinated policy definition and management, thereby, increasing the overall data quality across the organization.

The Result? Significant reductions in manual interventions and a centralized design process allowing the organization to have more predictable outcomes and faster response times.

Action Needed: Although there is significant improvement at this level, there is still room for an overall data integration strategy across the enterprise, furthering ways to analyze the data and improve the real-time responses.

INSIGHT

The organization perceives integrated data as critical for business. Senior management recognizes information as a strategic asset and implements significant policies and procedures across the organization.

1

RISK AND QUALITY FOCUSED

Standardized tools for data management including desktop to infrastructure are implemented throughout the enterprise. This is coupled with a well formed centralized planning and governance function.

2

BUSINESS INTELLIGENCE AND REPORTING

At this level, there are measureable increase in data quality and organization wide capabilities, such as, end to end data audits. Several enterprise-wide monitoring systems have also been implemented.

3

INTEGRATED BUSINESS RULES

The organization clearly sees the value of business rules and implements them across the enterprise to gain more insight into customer behavior - ultimately, positively affecting the lead management process and increasing conversion rates.

The Result? Institutional knowledge gained through level 1-3 enable the organization to predict results when approaching new areas that have not yet matured. Leading to a much better understanding of risk and management strategies with a data view. The organization has the tools needed to be proactive instead of reactive.

Action Needed: Now the goal is to use data and analytics to optimize your business processes across the enterprise. Being able to design better for the future not just the now.

OPTIMIZATION

The organization exploits data across the entire information supply chain. An optimized data management scenario moves focus to process automation enabled by data and analytics.

1

ADVANCED ANALYTICS

Well understood metrics are used to manage and measure data while being used to support external factors, such as, sourcing, risk and profit margin. Reuse show positive gains from data sharing.

2

ON-THE-FLY DATA QUERIES

The organization is much more nimble with their processes with on-the fly-data queries allowing all users to see the data in real time, but also use the data to effect change immediately.

3

CROSS DEPARTMENTAL BUSINESS PROCESS FLOWS

Full integration of data across disparate systems gives a more well-rounded picture of the data and the organization is able to optimize both their internal and external processes.

The Result? Typically business functions can be abstracted away from the data level enabling further independent business process design. The organization can truly capitalize on the data as a competitive advantage in the marketplace.

Action Needed: Guard against complacency because information excellence can dicipate as the business grows.

WHAT NEXT?

Most organizations are at the basic level of integration maturity, so users who are championing new or different ways of using data integration will most benefit from this model. Mostly, by educating senior level management and business leaders about the risks of not managing data enterprise-wide, and on the benefits of doing so. Always presenting use cases within the context of their own experiences.

***Risks** - Look for examples where the organization has already failed, as a result of, poorly managed data. For example, how much time and resources are used to meet financial reporting requirements to comply with regulations? Is customer service low in certain areas? How often do employees complain about manually entering data and what kind of data quality issues are you experiencing as a result?*

***Benefits** - Create scenarios for the organization that illustrate the benefits gained at moving through each level of this model. For instance, show how departments that hadn't previously exchanged data were able to to reduce costs by eliminating redundant data and avoiding manual rework by using common and consistent sources of data. And, then find common scenarios where even more benefits can be realized through automating the data and business processes.*

Interested in seeing where your organization might fit within this integration model? Sign up for a data integration assessment and we can help determine where you are and what you need to do to get to the level you want.

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2 BEST PRACTICES OF INTEGRATION

WHAT TO DO!

BEST PRACTICES FOR A SUCCESSFUL INTEGRATION

Making it easy for the business user and giving power to the developer is key. When you think about what it takes to have an integration project go well, you should think about the adoption of the process and tools. Your business user should have easy to use tools (no coding required), multi-level dashboard reporting that allows them to check and validate data in flight, as well as, the ability to drill down to the source and issues. Just as important, is giving the right tools to the developer so they can easily orchestrate data, link entities from one type to another and manage complexities across event models. Giving them field level data manipulation will ensure the highest level of data quality.

Securely connecting cloud to on premise systems is critical to many enterprises. As an organization which may have both on-premise and cloud applications, you want to make sure you have the option to connect either or both securely and seamlessly. And as your need for more enterprise wide integration occurs, consider a tool or platform that has an open architecture to grow with you - **a connect once, connect everywhere capability.** Below are some more specific capabilities we offer through our PutItForward platform. Interested in seeing how these could help your own integration project? Let us know how we can help.

CONNECT	DESIGN	DATA MGMT	DATA QUALITY
Connect Once/Everywhere	No Code/Visual Designer	Smart Shuttle Change Mngmt	Data Services
Industry Connector Library	Auto Data Mapping	Multi-Level Parallel Mngmt	Quality Checks & Rules
Secure On-Premise	Integrated Help/Self Guide	Monitoring	API - Management
Connector SDK	Select and Propagate	Dynamic Routing and Scoring	Pre-built /Open Access

QUESTIONS TO ASK AN INTEGRATION PARTNER

How comprehensive is the solution and will it scale to fit our needs now and in the future?

Organizations have data across sales, marketing, finance, operations, customer service and HR - many integration solutions only focus on one or two of the data sets while others can incorporate all of these and give you a complete view of your enterprise. Be sure to pick an integration partner that can potentially help you integrate to all of these type of applications. Your data sources and volumes will not remain the same as your organization grows. Can your integration partner handle your increasing data needs? Do they offer a solution that can connect your data real time? How fast you can access the right data will determine how fast and effective you can respond to your own customer's needs.

How easy is the solution to use?

Solutions that offer a self-service interface, like click and drag, can offer users more flexibility and control. Easy to use tools can provide the Line of Business users the ability to benefit from the solution while saving the IT department's time for more complex projects. More importantly, llike discussed earlier, easier tools make for faster and more effective adoption across the enterprise.

Can I be assured that my data is secure?

Just because a tool is easy to use does not mean it is secure. A very important question to ask is how do they connect on-premise and cloud applications? Do they only have the option of connecting through their own servers? Or can they also provide options within your own firewall?

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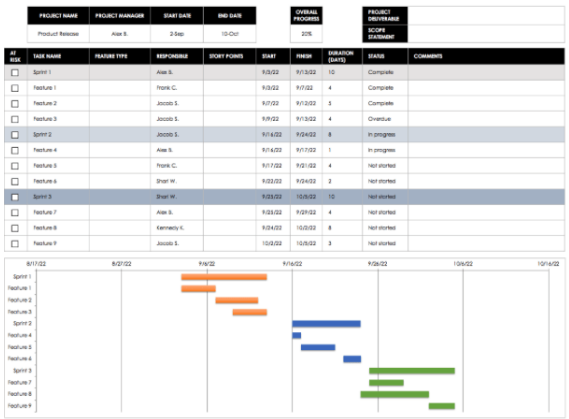
3 NEXT STEPS OF INTEGRATION

How to get Started?

PLANNING



IT'S IMPORTANT TO THINK THROUGH YOUR INTEGRATION PROJECT - FROM TOP TO BOTTOM- ENSURING EVERYTHING IS IN PLACE BEFORE STARTING.

Project Plan & Methodology

A great project has an even better plan. Work with all your constituents to understand what systems you need to connect now and even in the future. It never hurts to think ahead and understand the other possible systems you may need to connect to. But, more importantly, what type of data and reporting you need to be successful. How fast do you need the data and how you would like to receive it

Right Tools & Skills

You can have a great plan but if you don't have the right tools to execute - the project will fail. Are you on a timeline or budget? If so, you may not want to build it yourself. This takes time and money and what if it doesn't actually work like you need it? You also need a tool that is both easy to use but also customizable to fit your needs. Not one project is the same, so you need a tool that can adaptto this change. Do you need predictability? Then a tool that sets conditions will be paramount.

Support

Having a tool that your users can use is very important for adoption but figuring out everything on your own is not only difficult but can also be a productivity sink. You need a partner that can come alongside you, that has worked with many customers just like you, but still able to understand your specific nuances and how to design the project best for your needs alone. And, most importantly, provide the ongoing support needed to make your project successful.

RECOMMENDATIONS

IT IS NOT ALWAYS A STRAIGHT-THROUGH PATH FROM SYSTEM TO SYSTEM.

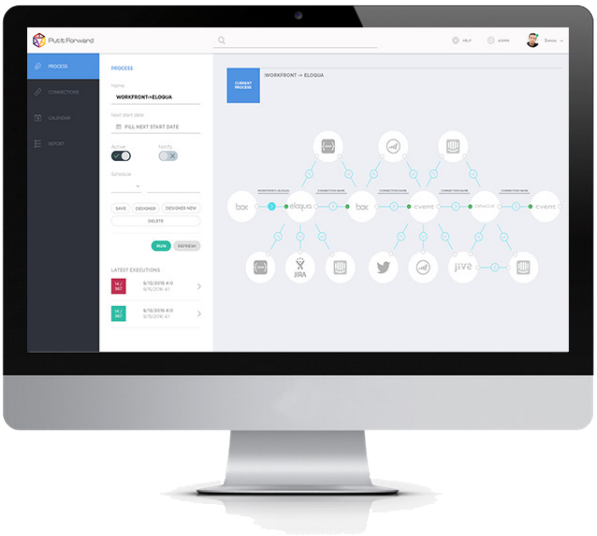
You must consider the systems, people and the data in between:

1. **Systems** - this is usually a given, understanding which systems need to be considered for the integration, but understanding that they have different functions and act differently means you will need to account for that in the integration tool you select. Does the tool have the ability to connect to the systems now and others in the future?
2. **People** - many times when considering an integration project, both teams have some collaboration already, however, they also have different ways of working, tools they are used to and even the data they need. You will need to discuss how this will affect your business processes post integration.
3. **Data** - Not all data is needed to be transferred into the target system to be useful - **through our Foresight tool** - you can have a "view only" within the target system - so rather than running a report you have the ability to view in context - project data and analytics seen real time. It allows the user to go faster, see further and act decisively.

Things that will make your project run more efficiently and effectively:

- ***System of Record*** *- decide where final form, master data will reside (ex: account, company info, contract). It is always good practice to keep financials only in the financial system.*
- ***Bi-directional flow of data*** *- one way cannot scale to the environment and is not preferable to how an organization functions.*
- ***Sync on real projects*** *- don't sync all data if it is not pertinent to the project, (ex: don't sync all bug fixes just the important data that needs to be shared in both systems.)*
- ***Master IDs*** *- Keep things in sync. Each system has their own identifier or key that needs to be linked so you either need to create a master ID or a hidden key. See Indentity Resolution topic.*
- ***Documents*** *- From a perspective of governance and compliance you should not replicate your documents but keep them in one system of registration.*

How can we help you with your next data integration? What do we offer that other integration partners do not and more importantly, how does that benefit you?



We provide a fully integrated and synchronized platform that improves efficiencies, reduces data errors and minimizes IT costs across the enterprise.

Enterprise-wide Synchronization - Stay synchronized with all your organizational units, legacy systems and other cloud offerings and on-premise applications.

Platform Management - Manage the components of your platform from a single point. Add, remove or modify the components from any marketing, sales or operational platforms seamlessly and securely. You don'thave to settle for one or two data sets we cover over 320+ applications with our platform.

Multi-frequency Integration - Choose how fast your data flows and in what direction. From real-time to intra-day to one-time loads and everything in between we have you covered. We help you meet your customer needs faster by providing you the real time data you need.

Connect Once - Connect Everywhere - Once you connect to the PutItForward platform you can connect any other supported application with a click, drag and drop. More systems, services and data sources than you thought possible and more being added every day.

Modern Architecture - The Put It Forward platform is purpose built for cloud or on-premise based deployment that connects cloud solutions, on-premise applications and data sources. A modern platform that can accommodate any type of integration seamlessly and securely.

But we don't stop there, we make it easy for all to use, by providing pre-built connectors that can be configurable and built on any device. Allowing all users in the organization to have tools that are easy to use but also most effective in getting the job done. Interested in seeing this for yourself, click below.

Put It Forward®

START YOUR PROJECT FAST AND GET RESULTS

Intelligent, Fast Data Management - PutItForward automatically discovers what data is available in the system to help you get started quickly. The application is cloud based so there isn't any delay in getting non-technical and technical users started.

Point, Click, Get Your Data - point our prebuilt connectors from PutItForward platform or use your own connector to automatically integrate the source and destination. Click on the data services or add any business rules or transformations to the integration. Get the data flowing between the source and destination by selecting the integration interval and activating it. It's that simple! Not interested in transferring all your data into the target system? Our profiler tool provides you a "view only" within the target system, so you can see data in context rather than waiting for a report.

We also provide a **dedicated Delivery Engagement Manager** to help you with technical setup, requirements gathering, testing in a Sandbox environment; and access to an Implementation chat room throughout the project. **As a result, our customers have seen great success. Some are below.**

conversion

HIGHER CONVERSION

275% INCREASE IN CONVERT TO CLOSE AND 175% REDUCTION IN LEAD QUALIFICATION TIME.

cost

BETTER ANALYTICS

ENTERPRISE WIDE 360 DEGREE VIEW OF CUSTOMERS AT ALL TIMES.

reduction

COST REDUCTION

4X REDUCTION IN FTE OVERHEAD COUPLED WITH A 700% INCREASE IN DATA UTILIZATION.

TESTIMONIALS

“WHAT YOU JUST DID FOR OUR TEAM PRODUCTIVITY AND HOW WE WORK WAS MAGIC - YOU GUYS ARE ROCK STARS, I‘M TRULY BLOWN AWAY”

Business operations, data integration and robotic process automation scenario which spans multiple organizational functions.

Uma Asthana
www.facebook.com

“FOR US IT WAS A NO-BRAINER, HOW COULD WE NOT HAVE OUR TEAM APPLICATIONS TIED TOGETHER VIA SINGLE SIGN ON AND CENTRALIZED ADMINISTRATION? PUT IT FORWARD SOLVED THIS ACROSS OUR ENTIRE USER BASE AT HUGE SCALE”

IT Operations to enable the business to scale, manage operational costs and deliver enterprise wide security.

FOSSIL

Kristyn Cobstill
www.fossil.com

WORKING TOGETHER

WHETHER YOU ARE JUST GETTING STARTED OR MID-PROJECT, WE CAN WORK TOGETHER

Perhaps you have read this and would like to assess where you are at in the Integration Maturity Model, or maybe you already know and just need the right tools to present this concept to your Line of Business. We have Solution Engineers that are here to help.

Maybe you have already been doing your research and would like to see our tool in action. We are happy to set up a customized demo for your needs and answer all your questions to get you started.

Or you could be in between the two and would benefit from a Discovery Session with one of our Solution Engineers to help uncover areas of improvement and a project plan that will get you there.

Contact Us Now

Austin
San Francisco
Toronto
Oslo

415 842 9842

info@putitforward.com

www.putitforward.com

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