NEXT STEPS TO
INTEGRATION

HOW TO GET STARTED?

Put It Forward

Be Connected

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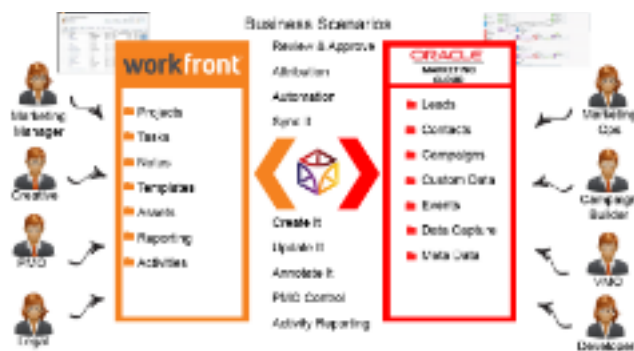
IT'S IMPORTANT TO THINK THROUGH YOUR INTEGRATION PROJECT - FROM TOP TO BOTTOM- ENSURING EVERYTHING IS IN PLACE BEFORE STARTING.

Project Plan

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

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 adapt to 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 effect your business processes post integration.

3. **Data** - Not all data is needed to be transferred into the target system to be useful - **through our profiler 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.*

- *Documents - From a perspective of governance and compliance you should not replicate your documents but keep them in one system of registration.*

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 of leads in marketing.	*reduction*	**COST REDUCTION** 4x reduction in FTE overhead coupled with a 700% increase in data utilization.

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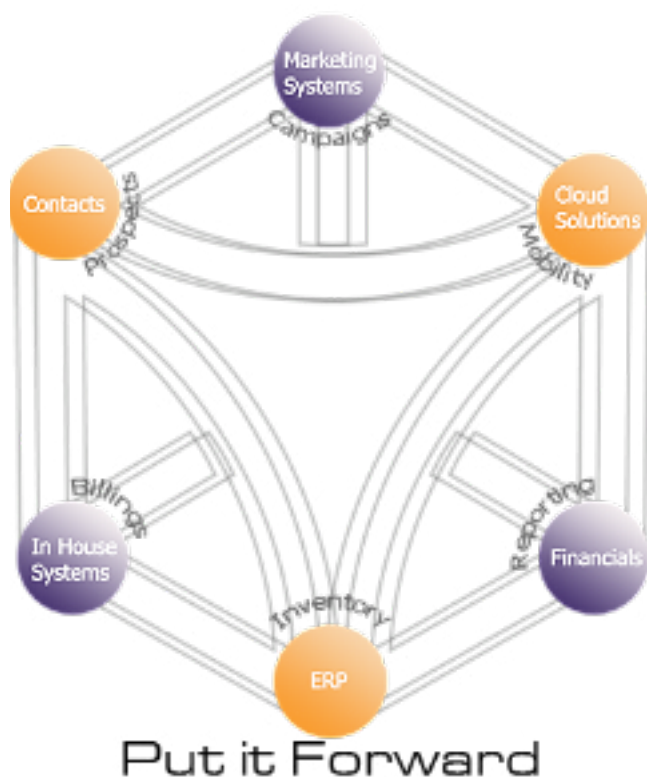
We provide a fully integrated and synchronized platform that improves efficiencies, reduces data errors and minimizes IT costs across the enterprise.

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't have 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 PutItForward 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. Interested in seeing this for yourself sign up for a solution demo.

WE CAN HELP

Contact Us Now

Austin
San Francisco
Toronto
Oslo

info@putitforward.com

www.putitforward.com

WHETHER YOU ARE JUST GETTING STARTED OR MID-PROJECT, WE CAN HELP.

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.

Put It Forward

Be Connected