

informatics
Put potential to work:

Compliments of

Informatica Special Edition

Salesforce® Integration

FOR DUMMIES®

A Wiley Brand

Learn:

- How integrating Salesforce.com with your other apps can improve your business results
- How to prepare an optimal Salesforce integration strategy
- How to prioritize integrations



Liz Kao

About Informatica

Informatica Corporation (Nasdaq:INFA) is the world's number one independent provider of data integration software. Organizations around the world rely on Informatica for maximizing return on data to drive their top business imperatives. Worldwide, nearly 5,000 enterprises depend on Informatica to fully leverage their information assets residing on premise, in the cloud and across social networks. For more information, call 1-888.345.4639 in the United States or visit **www.informaticacloud.com**.

***Salesforce
Integration***
**FOR
DUMMIES®**
A Wiley Brand

Informatica Special Edition

by Liz Kao

**FOR
DUMMIES®**
A Wiley Brand

Salesforce Integration For Dummies®, Informatica Special Edition

Published by
John Wiley & Sons, Inc.
111 River St.
Hoboken, NJ 07030-5774
www.wiley.com

Copyright © 2015 by John Wiley & Sons, Inc.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

Trademarks: Wiley, For Dummies, the Dummies Man logo, The Dummies Way, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc. and/or its affiliates in the United States and other countries, and may not be used without written permission. Informatica, the Informatica logo, and Informatica product names are registered trademarks of Informatica Corporation. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc., is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: THE PUBLISHER AND THE AUTHOR MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS WORK AND SPECIFICALLY DISCLAIM ALL WARRANTIES, INCLUDING WITHOUT LIMITATION WARRANTIES OF FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES OR PROMOTIONAL MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR EVERY SITUATION. THIS WORK IS SOLD WITH THE UNDERSTANDING THAT THE PUBLISHER IS NOT ENGAGED IN RENDERING LEGAL, ACCOUNTING, OR OTHER PROFESSIONAL SERVICES. IF PROFESSIONAL ASSISTANCE IS REQUIRED, THE SERVICES OF A COMPETENT PROFESSIONAL PERSON SHOULD BE SOUGHT. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM. THE FACT THAT AN ORGANIZATION OR WEBSITE IS REFERRED TO IN THIS WORK AS A CITATION AND/OR A POTENTIAL SOURCE OF FURTHER INFORMATION DOES NOT MEAN THAT THE AUTHOR OR THE PUBLISHER ENDORSES THE INFORMATION THE ORGANIZATION OR WEBSITE MAY PROVIDE OR RECOMMENDATIONS IT MAY MAKE. FURTHER, READERS SHOULD BE AWARE THAT INTERNET WEBSITES LISTED IN THIS WORK MAY HAVE CHANGED OR DISAPPEARED BETWEEN WHEN THIS WORK WAS WRITTEN AND WHEN IT IS READ.

For general information on our other products and services, or how to create a custom *For Dummies* book for your business or organization, please contact our Business Development Department in the U.S. at 877-409-4177, contact info@dummies.biz, or visit www.wiley.com/go/custompub. For information about licensing the *For Dummies* brand for products or services, contact BrandedRights&Licenses@Wiley.com.

ISBN: 978-1-119-03763-7 (pbk); ISBN: 978-1-119-03773-6 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

Publisher's Acknowledgments

Some of the people who helped bring this book to market include the following:

Project Editor: Carrie A. Johnson
Acquisitions Editor: Katie Mohr
Editorial Manager: Rev Mengle

Business Development Representative:
Karen Hattan
Production Coordinator: Melissa Cossell
Special Help from Informatica:
Ajay Gandhi

Table of Contents



Introduction 1

About This Book	1
Icons Used in This Book.....	1
Beyond the Book.....	2

Chapter 1: Understanding Salesforce 3

Starting a Cloud Revolution.....	4
Tracking More Than Your Sales Pipeline.....	5
Discovering new sales insights	5
Sharing a more unified view of the customer	6
Integrating for endless possibilities	7

Chapter 2: Optimizing Salesforce's Role in Your Company 9

Dealing with Data Complexity	9
Understanding simple causes of data complexity.....	9
Understanding how increasing data complexity affects Salesforce adoption	10
Expanding the Value of Salesforce for Optimal Adoption	11
Connecting for efficiency.....	12
Trusting your data.....	13
Accessing unified information	14
Knowing What's Needed for Optimal Salesforce Integration.....	15
Using existing bulk data.....	15
Synchronizing data.....	16
Replicating data	16
Integrating applications in real time	17
Having a master data management strategy.....	18
Making records consistent across systems	19
Keeping your sandbox environments secure	20
Validating business data.....	21

Chapter 3: Navigating Your Salesforce Integration Life Cycle 23

Understanding Your Salesforce Needs as Your Usage Grows	23
Preparing a Salesforce Integration Strategy	25

Recognizing key stakeholders.....	26
Identifying key systems for the project	27
Assessing the data and its use cases	27
Discerning better ways to integrate your data	28
Picking Salesforce integration tools that fit your budget.....	29

Chapter 4: Prioritizing Your Salesforce Integration Road Map31

Realizing the Business Benefits of Salesforce Integration.....	31
Selecting Salesforce Integration Solutions.....	33
Cloud or on-premises offering	33
Multi-tenant or hosted	33
Ease of use.....	34
Try and buy versus rapid deployment	35
Technical or business usage	35
Connectivity	36
Scalability	36
Vendor legitimacy.....	36

Chapter 5: Learning from Your Peers.....37

Importing Data in Bulk	37
Integrating Salesforce and Back Office Systems	38
Real-Time Application Integration.....	38
Connecting Salesforce and In-House Systems.....	39
Managing Data Complexity with Limited Resources.....	39
Adhering to Regulatory Needs	40

Chapter 6: Ten Do's and Don'ts When Evaluating a Salesforce Integration Solution41

Do Have a Data Integration Plan	41
Do Have Budget Allocated	42
Do Sign Up for Trials.....	42
Don't Think All Solutions Are Alike	42
Don't Ignore Security, Compliance, and Performance Needs.....	42
Don't Forget to Network with Peers	43
Do Find a Tool with Pre-Built Connectors to Other Systems.....	43
Do Value an Intuitive Interface.....	43
Do Find a Tool That Works for Business and Technical Users	44
Do Look for a Tool That Grows with Your Needs.....	44

Introduction



Welcome to the world of Salesforce.com and the endless possibilities you can realize from integrating its products with other key systems within your organization. Its ease of use is responsible for both its widespread adoption and expansion throughout businesses as well as the speed with which poorly planned configurations can become unnecessarily complex business system designs. Have no fear: This book will help guide you along your Salesforce integration journey.

About This Book

If you're just starting out or have been struggling for a while with how to effectively integrate Salesforce with other essential business applications, you've come to the right place. In this book, you find out about Salesforce and its increasing role within businesses. You learn how expanding Salesforce's usage within your company can increase the complexity of data as it flows from one system to another. And you discover how to prepare an optimal Salesforce integration strategy, how to prioritize integrations, and what characteristics to look for when choosing integration tools.

The challenges and strategies discussed in this book also apply to integrating other cloud-based customer relationship management (CRM) systems — like Oracle CRM On Demand or Microsoft Dynamics CRM. You don't have to be technical to understand Salesforce integration concepts. As long as you can picture information moving from one system to another and are in an organization where information needs to be brought together for use in different computer systems, this book is for you.

Icons Used in This Book

For Dummies uses helpful icons to point out information. You will find the following three icons in this book.



The Tip icon marks tips (duh!) and shortcuts that you can use to make Salesforce integration easier.



The Technical Stuff icon marks information of a highly technical nature that you can normally skip over. The inner techie in you might enjoy it though!



The Warning icon marks important information that may save you headaches, so pay close attention.

Beyond the Book

You can find additional resources about integrating Salesforce (and Informatica's approach to it) by visiting the following:

- ✓ **Ensuring Your Success with Salesforce white paper:**
now.informatica.com/en_ensuring-success-with-salesforce-EMA_analyst-report_2649.html
- ✓ **Free 30-day trial of Informatica Cloud:**
www.informaticacloud.com/trial
- ✓ **Cloud and on-premise connectors:**
www.informaticacloud.com/connectivity
- ✓ **Informatica's Cloud Data Integration solutions:** www.informaticacloud.com/cloud-data-integration
- ✓ **Informatica Cloud customer testimonials:**
www.informaticacloud.com/customers/customer-profiles.html
- ✓ **SAP-Salesforce QuickStart Integration:**
www.informaticacloud.com/quick-sap-to-salesforce1-integration
- ✓ **Cloud Application Integration:**
www.informaticacloud.com/cloud-application-integration.html
- ✓ **Informatica Cloud iPaaS Platform:**
www.informaticacloud.com/ipaas-platform.html

Chapter 1

Understanding Salesforce

In This Chapter

- ▶ Understanding Salesforce's role in pioneering the era of cloud computing
- ▶ Using Salesforce strategically within a sales organization
- ▶ Adopting Salesforce beyond the sales team

When the age of cloud computing started in the late 1990s, some businesses decided to rent their applications to customers over a broadband connection. This relieved customers of the responsibility of maintaining the hardware and software systems on which those applications ran. Not all IT managers breathed a sigh of relief, however. Some were dubious about the safety of storing their company's information on someone else's servers. Or they felt the feature set of these applications was too immature for prime time, heavy adoption. Others, however, either took a chance on this innovation or welcomed it with open arms because their expensive enterprise software was often sitting on a shelf gathering dust. Often, enterprise applications like customer relationship management (CRM) systems were pricey and neither readily adopted nor well loved. Decision makers were more than happy to pay a straightforward subscription fee for a product that looked modern (and completely different from the primitive graphics built pre-Internet age), and that "just worked." Thus was ushered in the Software-as-a-Service (SaaS) era.



SaaS is one model of cloud computing services in which access to an application is delivered over the Internet. Other cloud computing models include infrastructure as a service (IaaS) and platform as a service (PaaS).

In this chapter, you discover how a company called Salesforce.com gave credibility to the concept of cloud computing. You also discover more about how its flagship CRM product empowered a new generation of customer-facing business users.

Starting a Cloud Revolution

An early front-runner in the SaaS movement, San Francisco-based Salesforce.com sold a CRM application (now called Sales Cloud) that enabled salespeople to better track their interactions and deals (or “opportunities” in Salesforce lingo).

At the time, Salesforce.com revolutionized the business software industry by pushing the envelope on traditional industry conventions, such as having a simple designed-for-the-web user interface, straightforward per-user monthly pricing, basic dynamic reporting, and an administration panel that allowed business people to empower themselves to configure the system for their needs.

The company’s culture even caught people’s attention as CEO Marc Benioff proclaimed the 1-1-1 integrated philanthropy model. That’s where companies would commit 1 percent of their product, 1 percent of company equity, and 1 percent of their time to charitable causes.

Along with a noteworthy slogan calling for “the end of software,” the company sure knew how to capture the attention of many curious businesspeople who signed up for its free 30-day trial in droves. No other business software provider offered such a thing as a free trial. Prior to salesforce.com, you had to go through a painful qualification process with a junior sales person who then sent you to another sales person who then had to come meet you before you even got close to seeing a working, breathing demonstration that you weren’t even allowed to touch or configure. Salesforce.com’s free trial was another challenge to the status quo that business users were ready to adopt.

Fast-forward to the present day, where cloud-based business applications exist in all shapes and sizes. The landscape is dotted with apps for your front office and back office needs, handling specific areas of a business process (like tracking

commissions, or generating signatures on documents), or entire aspects of a business life cycle (like order-to-cash, or lead-to-order).

Though corporate social responsibility and the subscription model for cloud applications are quite commonplace today, remember that one company started this revolution, and it's proven itself to be here for the long haul.

Tracking More Than Your Sales Pipeline

Salesforce's longevity is apparent in its wide adoption within organizations. At first, it was used just to track a pipeline of opportunities. Sales teams suddenly had quick visibility into what deals were in play, what deals were won, and which ones were lost. Salesforce's point-and-click reporting tool also empowered business users to get quick access to information without having to submit a request to a technical team to fulfill.

Discovering new sales insights

Sales teams also realized that Salesforce's easy configuration platform let them quickly track details that could aid in better analyzing trends in their sales cycle. Why were deals being lost? Who were the competitors involved? Where did the most fruitful opportunities come from? Any detail that was relevant to a specific business's processes could be reported on, as long as people balanced the need for information with the sales person's tolerance for filling in those fields. That additional reporting insight helped give savvy Salesforce-using businesses an edge over their competitors, as sales teams were now able to quickly and easily analyze aggregated team performance and trends in one unified reporting view. Stated simply, it just worked. Figure 1-1 shows you a sample dashboard a business user created in Salesforce. Before Salesforce, businesspeople had no way of creating something like this, let alone in minutes.

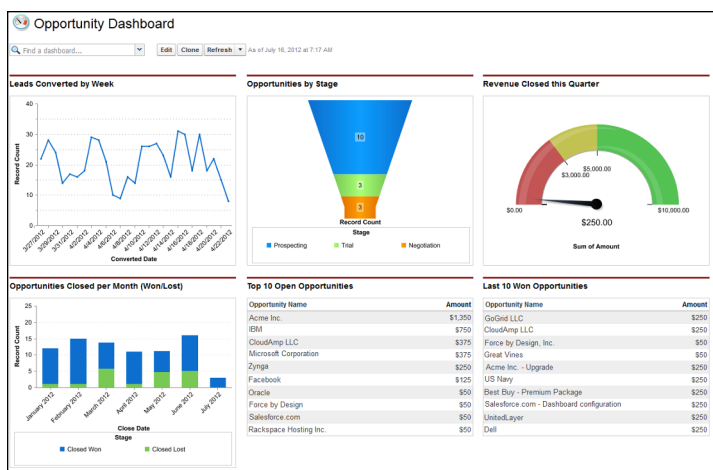


Figure 1-1: Tracking metrics on a Salesforce dashboard.

Sharing a more unified view of the customer

As Salesforce's feature set matured, it expanded to accommodate the needs of other customer-facing teams, while allowing those original sales teams to gain a deeper understanding of their world. Now marketing teams could track the fruit of their demand generation activities within Salesforce through its campaign management feature, and customer support agents could easily see all the support cases submitted by a customer and provide common solutions to frequently reported issues. These groups were now able to see a more unified view of the customer, which improved the customer experience they provided.

A few examples of how companies used Salesforce to gain better insights into their customers include the following:

- ✓ Reporting on the lead sources correlated most frequently with won business . . . or lost business
- ✓ Increasing cross-sell and upsell opportunities based on existing customer purchases
- ✓ Identifying most valuable customers based on a rollup of closed opportunities

Chapter 2

Optimizing Salesforce's Role in Your Company

In This Chapter

- ▶ Understanding how data complexity occurs
 - ▶ Addressing an evolving hierarchy of data needs
 - ▶ Knowing how to prepare for optimal Salesforce integration
-

As your organization's uses for Salesforce increase and departments other than Sales want to store and report on the information in Salesforce, consider the implications of increasing data complexity. You may already be seeing that in your current Salesforce instance. The key to managing data complexity is understanding and anticipating factors that contribute to it and having a plan for handling it as best as you can, so you can use Salesforce to its fullest potential.

Dealing with Data Complexity

Data complexity within and between your business applications doesn't just happen — it usually builds up over time as processes and actions from different groups build on each other.

Understanding simple causes of data complexity

Data complexity can increase due to several contributing factors. For example, companies that offer a limited-time warranty of their product may want to capture the purchase date

in Salesforce and also the date when the warranty is scheduled to expire (X days after the purchase date). This allows a sales manager or contract renewal specialist to verify any refunds due to the customer if the product is returned. A product team may want to capture the reason for the refund request. The account management team may want to see if the requests were accepted or declined, and for what reasons.

Even in this common business process, several pieces of data are captured and analyzed by different teams. Now assume a new team wants to capture the part number related to any product purchased. The catalog of product part numbers could be maintained independently in Salesforce, but there already exists an inventory management system where the part numbers are stored and updated regularly. New part numbers are added constantly and would be redundant to replicate in Salesforce. Then someone suggests integrating Salesforce with your inventory management system so the part numbers can be pulled straight from that system and updated into Salesforce for easy access by customer-facing teams.

Understanding how increasing data complexity affects Salesforce adoption

An impatient business group may demand an interim Band-Aid step: Just import those numbers once into Salesforce while IT figures out the ideal approach. As those part numbers in Salesforce get outdated, end-user frustration increases. Trust in the accuracy of data begins to erode. Now IT has to not only plan an ideal integration approach, but also address problems caused by rushing the import of numbers that stakeholders requested. In the meantime, other business users propose work-arounds as they wait for accurate part numbers. New hires don't know which part numbers to reference anymore in Salesforce, and suddenly your data complexity issues have snowballed. End-users are grumbling and blaming Salesforce (or you!).

Careful planning is needed to ensure that data complexity factors are addressed thoughtfully.

Expanding the Value of Salesforce for Optimal Adoption

Why bother having Salesforce data commingling with data from other systems, anyway? Decades ago, data spread across systems was the norm, causing silos of information to appear in organizations (especially in large companies that have been around for a long time). Requests for information from other systems are often fulfilled slowly, as those IT teams with niche expertise have to access data for you and everyone else making similar demands. But the cloud computing revolution changed those expectations. Tell people who are used to getting quick results from Salesforce that they have to wait for access to data, and frustration mounts. And this cloud app revolution has spread to other parts of the business:

- ✓ NetSuite for accounting
- ✓ RightNow for customer service
- ✓ BigMachines for CPQ (configure/price/quote)
- ✓ Marketo for marketing automation

Expanding Salesforce's footprint across your organization can result in improved business processes, as long as you manage your data complexity well. Your experiences with Salesforce integration can be categorized into a data hierarchy of needs (inspired by psychologist Abraham Maslow's theory). In this case, data needs are met in a certain sequence before complete business optimization, or data self-actualization, is attained. In Figure 2-1, you can see the hierarchy of data needs for Salesforce.

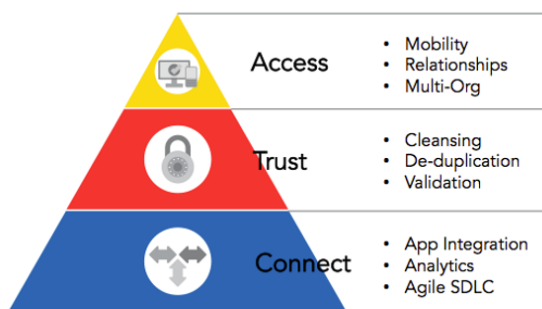


Figure 2-1: The data hierarchy of needs.

Connecting for efficiency

The initial building block that successful Salesforce customers have in common is they have realized efficiency and work-quality improvements. These are caused by different teams (often customer-facing) working off of the same underlying customer data. However, life with Salesforce often doesn't start that way. Customer information may initially be spread out over several systems.

Salesforce users will typically demand that distributed customer information appear directly in Salesforce to reduce the need for multiple logins, increase their efficiency, and give them easy access for analyzing that data. This is often the first introduction to Salesforce integration for many companies.

The goal in this phase is to successfully achieve connectivity with another application, to either pull data from it, or push data into it. For instance, when using the example applications mentioned in this preceding section, you may need to have your Salesforce leads' opt-out information shared with your marketing automation system. Aspects of your sales opportunity need to be shared with your CPQ system to build and send out a proper quote to a prospect. After an opportunity is closed, you may need to know inventory information in order to pull a product from the warehouse, pack it up, and tag it for shipping. Your accounting system should then know when your new customer should be sent an invoice to pay for this item.

Understanding what information needs to be where, at what step of a business process, and how often it needs to be updated, is key to supporting and managing a company's data needs.

Trusting your data

After you've integrated a few applications and are sharing data back and forth, you need to know if that data can be trusted. How information is defined, stored, and associated in one system may be different than in another system. The sales team may define when a prospect becomes a customer using the date when a contract was signed. The finance team may have its own definition of when a prospect becomes a customer, based on a separate date, like a subscription start date. Both systems may have a date field called "Customer Since," with different dates in each system. Now if those two systems are integrated, which field is an end-user supposed to trust? Who will know why those two fields might have similar names but show different data? What if the two fields are mapped to each other, and one system ends up incorrectly overwriting data in the other system? Now you don't know if that date meant "Customer Since" from the Finance or Sales department's perspective.

Sometimes information between systems may start off matching, but a change in one system won't get updated in the other system. This can often happen with "Bill To" addresses. A company's address in Salesforce might be the same address as what's listed for a large subsidiary that is buying your product, but the accounting system may have a different address stored, which more accurately reflects the location that should be receiving your invoices and sending you checks. One system may spell out state names in an address, while another uses two-letter abbreviations. If a customer undergoes an office move and changes its address, who and how will information be updated in either system?

Other times, information in Salesforce may not be unique, due to different people importing or creating data without confirming if that information already exists in the system. Large enterprise accounts often have several subsidiaries and departments linked together in a hierarchy based on inconsistent logic. This in turn can affect visibility into who the correct account owner

may be for a large account, and which territory a key account falls under. Maintainers of other systems may not want any Salesforce information to overwrite what they're capturing, since they don't trust its accuracy.

To improve trust in data that appears in any system, you need to have a plan for cleansing, de-duplicating, and validating it regularly. You also need a person who is motivated to act as a data bodyguard, ensuring (sometimes with great passion) that bad data doesn't make it into your house.

Accessing unified information

Assuming you've helped your organization manage its Salesforce integrations so people trust the data that they're seeing, you can then think about truly optimizing your business processes and having confidence in the analysis backing up your business decisions.

Better decisions can now be made about whether your sales reps are calling into all the right accounts based on accurately represented territories. You can better track total customer lifetime value as you get clarity on new sales made versus up-sells and cross-sells. You can then follow those customers to see which ones end up being bad accounts and defaulting on their payments.

Pulling together various repositories of customer information allows you to have a more holistic view of your customer. This sounds easier to achieve than it is, as many of you probably have experienced.

With Salesforce integration, the ease with which the system can be configured also means that information from across the enterprise can come in or go out with little regard to ensuring it is streamlined or massaged into the right form for the right audience at the receiving end. The technical buzz phrase you'll hear describing this issue is "rationalizing customer data." Accessing accurate data and trying to ensure the data stays accurate and clean is a Herculean task that you alone can't handle as your data complexity increases.

Fortunately, tools do exist that help you maintain accurate and consistent data across those various systems. What tools you decide to use to manage your integrations depends on the desired goals and objectives of your stakeholders.

Knowing What's Needed for Optimal Salesforce Integration

As you travel along your data hierarchy of needs, you'll come across different technologies that can help you do what you need in much less time and with less manual effort than if you were to try to do it yourself. It's important to identify what you need and whether it'll be easily adopted by its target users, which are often business people (not developers).

Using existing bulk data

Believe it or not, every time you upload a spreadsheet or a .CSV file into Salesforce to create new records, or correct new records, you're managing data. The data may come from several different sources. For example, after a conference like Dreamforce, exhibitors will have a file of all booth visitors who had their badges scanned. These are thousands of prospects that some marketing manager will want to ensure get loaded into Salesforce for an inbound sales development team to start contacting. Other times, an export can come from a back-office system such as SAP, with historical purchasing data that needs to be uploaded into Salesforce.

Salesforce offers basic import tools for business users, but often you may need something a little more powerful (while still not having to be a code warrior). Maybe you need to query a set of data and delete it from Salesforce. Or maybe you need to extract data from one system, make some consistent modifications to it, and then load it into Salesforce. Or perhaps you need to bring in a very large amount of data, all at once, from a complicated external system.

Think about how many different systems you are extracting data from, what systems you're loading data into, and how regularly you're doing this. What groups make these requests? Who will be helping them fulfill this request?

Synchronizing data

What if you have customer information in a system that is changing constantly? Maybe it's tracking your customers' usage metrics (kilowatts used per hour or day, API calls made, daily balance, and so on). Customer-facing employees may want this information, but where it resides is in a powerful database without a business-friendly interface to access it. That data can be synchronized within Salesforce, so business users can get more customer insights to better serve their customers.

What information would be most valuable if reflected in Salesforce? How often, realistically, would this data need to be refreshed (hourly, every minute, daily)? Assuming that this information can be updated once a day, late at night, you most likely won't want to volunteer to be the person manually extracting and uploading this data into Salesforce.



Look for a data integration tool that can help you schedule these synchronizations in a flexible enough way that can accommodate your business's needs. Also make sure that the tool can alert the right people if, for some reason, the synchronization fails. You also want to ensure only certain people can design your synchronizations, so that this great responsibility is in the hands of those most qualified to think through the business process and needs. Make sure that the tool's user interface is intuitive for business users so they don't have to spend valuable time using scarce developer resources.

Replicating data

Will your company want to regularly back up data from your cloud-based application, feed a data warehouse, or just store its contents somewhere on-premises, for security purposes? Maybe you're in an industry that has specific compliance or regulatory needs where data needs to be archived in a certain way.

A data replication tool can handle this in an automated fashion. Look for a tool that can give you some flexibility around your scheduling needs and that is also intuitive for your business users (see a pattern here?). Ideally, the tool is smart enough to notice what Salesforce data has changed since the last replication job, so only the changes are extracted into your other system.

Integrating applications in real time

As you begin to create and update bulk data in different systems and pull data from one system to update another, your application integration needs will mature. The combination of cloud computing and the mobile revolution have increased end-user demands on the quickness in which they want to access accurate data. *Real-time access means*, well, getting information from another system as soon as possible, so there's minimal delay in getting it from here to there. *Bi-directional synchronization* also means that it's not just one system pushing information into another for reference. Both sides can make changes and update the other with information. What happens if data is updated in each system, and submitted at the exact same time? You can see how managing data just got a lot more complex.

With real-time application integration needs, make sure you find a tool that can aid in handling all these complex integration scenarios. Business processes can cross multiple systems, with different paths taken depending on what decisions are made along the journey. Also consider if a tool can handle a combination of integration needs. What if your business process flow blends both real-time needs to information, with a need to kick off a batch job that updates a set of information in bulk?



Make sure you choose a tool that uses real-time APIs based on SOAP (simple object access protocol) or REST (representational state transfer) to help you more quickly connect to your various common application platforms. Both are commonly used standards for exchanging data between applications. The tools should allow you to use APIs that you have produced, or ones pre-designed by others. You want to ensure that the business users who know the process best can visually design processes in a manner that makes other flowcharts unnecessary.

The ability to see these process maps from a tablet or mobile device also broadens the opportunities to call up information when a laptop isn't always available. You may be touring a warehouse at a parts supplier when you hear of an upcoming process improvement that should be reflected in your map. You can be more collaborative and efficient if you're able to pull that process map up on a tablet and confirm things in real-time with other subject matter experts. Similarly, building process maps within Salesforce can allow you to easily see and share Salesforce-specific business flows, without having to exit the system to reference another tool.

Having a master data management strategy

Over the course of time, your Salesforce data won't stay pristine, no matter how hard you try. There may be the rogue mass import from a sales rep, but there are other very common examples where you may have multiple copies of the same contact or account in Salesforce. Perhaps your company has multiple Salesforce instances across various departments that are now integrating with each other. Or your company acquired or merged with another company that also used one or more Salesforce instances. Add in the several other traditional on-premise and cloud-based applications that may reside within your company (like NetSuite, Marketo, SAP, Oracle), and you've just added more data complexity to your situation.

Which system is the source of truth? That will depend on what data you're talking about. With Salesforce, for example, if it has duplicate contacts or accounts, what logic do you want to design and prioritize so that one can determine which record is the master? The ultimate goal is achieving a single customer view in order to stay ahead of the competition. That means data in the master system of truth is then propagated to the other child instances. If you're spending time regularly on tedious manual data duplication or address clean-up in Salesforce, yes, you most likely are fighting an uphill battle. You need a system to help be an extension of yourself, to review mass amounts of data and clean it in an automated fashion. The system should also be able to do this within one Salesforce instance, or consolidate data across several Salesforce instances, or among other non-Salesforce applications.

Making records consistent across systems

Multiple instances of Salesforce within a company happen more often than you think. Living in this scenario while still needing to get an accurate view of your accounts and contacts and how they relate to each other across your Salesforce instances is daunting. Which Charlotte Smith is the right contact at BigCo? You may see a C. Smith at BigCo Incorporated, Charlotte Smith at Big Co, and Charlotte Smyth at BigCo, Inc. But it's critical that sales teams targeting large complicated enterprises see accurate data to get their foot in the door within key divisions or subsidiaries, and to not step on toes in the process.



Look for a master data management (MDM) tool that can evaluate information across all Salesforce instances in your company and visually represent a hierarchy of accounts so you can determine who the ultimate parent account is and how the children roll up. This capability can help organize your existing accounts into a legal- or sales-defined hierarchy and also identify accounts where new opportunities reside.

With all this data, even if it's clean in one system, formats may still differ across systems. Can an MDM tool help you standardize data across your entire set of systems? No more records with country fields filled with USA, United States, or U.S. You decide what the standard should be, and the tool should be able to keep your data consistent.

Also make sure the system can help you find and flag duplicate records based on criteria you supply. There should also be an option to manually or automatically merge those records, once discovered. And if you had the intern do this and, oops, he merged the wrong records? You'll want the tool to be able to retrieve data that was mistakenly merged.

Look for a tool that is smart enough to find results even if there isn't a 100 percent match on the criteria you gave it. That's called fuzzy matching. Can the system learn over time to be smarter and more accurate with its fuzzy matching?

Keeping your sandbox environments secure

How many Salesforce sandboxes does your organization use? Hopefully at least one, so you can build and do user acceptance testing in a system where mistakes and changes can be made that don't affect your production data. When considering ways data can get more complex in your organization, you'll have to remember the data in your sandboxes, and any security risks.

Not only do your IT and Engineering departments have to worry about protecting your company's data from external eyes, but they also need to understand what data resides where and who in your company is cleared to see it. This even applies to sandboxes, as they are testing environments. That means a lot of people are touching these systems to test code, review designs with end-users, and conduct end-user training. And this sandbox information may be exposed to non-employees as IT organizations use offshore resources to make changes in sandboxes that employees ultimately push to production systems. And what if someone wants to test out an email marketing campaign in the sandbox and mistakenly emails hundreds of users because their real emails were in the system?

Add other applications' sandboxes into Salesforce to test that integration (like with a human resources system), and you risk a lot of people in the sandbox seeing information they normally wouldn't see in a production environment. So what will you do to remedy this situation?



Please don't say that you'll manually try to change all the financial data or email addresses. And please don't offer to spend some time creating fake records . . . your time is more valuable than that! Understandably, you may not have any choice. So though manual masking of production data and creation of sample data is a good start, it won't scale as your business processes get more complex and you integrate with more systems.

Look for tools that can help you automatically mask confidential or sensitive information within a test environment. Look also for ones that can create test subsets of your data.

Validating business data

Now that you've gotten some exposure to the types of Salesforce integration that can happen, you should also think about how to identify and fix existing incorrect data, and how to minimize the chances of it getting into your system. If you're not in Marketing, you may want to grab an extra copy of this book so you can share this section with them.

Accounts and contacts are the lifeblood of your Salesforce system. Without them, you have no opportunities to grow, no marketing campaigns to send, and no customer issues to track. So it behooves you to want to make sure that all the effort your marketing and sales teams are expending will actually reach your audience. Incorrect or outdated emails, phone numbers, and addresses are costly in both time wasted and money spent.

What could you do to validate a contact's information in real-time, before it even enters Salesforce? Believe it or not, there are tools out there that can verify whether an email in a web form is legitimate, by looking if it's a well-formed email address that meets basic email standards, if the domain name listed exists, if the username exists by checking against mail servers, and so on.

Similarly, does the contact's address check out? Does it reference a city, country, and Zip code that actually exist? Can a tool help verify this data for you from a third-party vendor, and then allow you to make updates on records, in real-time? Is the phone number on a "Do Not Call" list? Certain Salesforce integration solutions allow you to check for all of the aforementioned in real-time — right when that information is being manually added into Salesforce. Other types of solutions let you check a list of contact phone numbers with one-off batch processing. And some types provide both real-time and batch capabilities.

If you use a marketing automation system that captures this information prior to it appearing in Salesforce, you'll need to find a tool that works for that system, too.

Customer data often enters into your system by way of the customer's own hands. Maybe they're signing up for a trial, downloading a white paper, subscribing to a catalog, checking out of a shopping cart page, or requesting a demo. There's always a chance that, in filling out that web form, fat finger syndrome can occur and typos get entered. Tools exist to aid individuals when filling out forms, so they don't have to type in as many fields. For example, tools can check email validity and auto-populate addresses to cut down on errors.

Chapter 3

Navigating Your Salesforce Integration Life Cycle

In This Chapter

- ▶ Comprehending how data complexity needs evolve
- ▶ Getting ready for an integration project
- ▶ Assessing resource needs

There is a general sequence of events within a company as it matures in its Salesforce integration journey. In this chapter, you explore what areas to tackle first and how to prepare the scope of your integration strategy.

Understanding Your Salesforce Needs as Your Usage Grows

As users within your company get more used to Salesforce and its adoption grows, you'll most likely run into several data complexity milestones. Use the chart in Figure 3-1 as a reference for the next business scenario that comes up, dealing with your Salesforce instance's data.

Here are some specific examples for each of the milestones in Figure 3-1:

- ✓ **Initial contacts data loading errors:** How many new sales people have you known who imported their entire Rolodex of contacts into your system without you knowing or condoning it? Often there's little forward planning to handle data errors that crop up as a result of unauthorized mass

imports, and no one is exactly volunteering to clean up duplicate or outdated data.

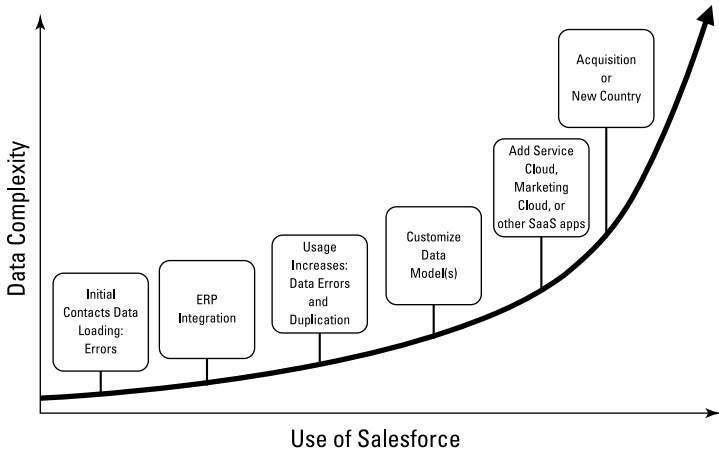


Figure 3-1: Maturing Salesforce usage increases data complexity.

- ✓ **ERP integration:** Integrating information from your back-office systems can happen as front-office users want to see more customer information after a deal has been closed. These systems may or may not be cloud based. And they have their own vocabulary that often conflicts with the phrases you learned so well in Salesforce. An accounting system interprets “Accounts” very differently from Salesforce. So how do you bring something like a customer’s balance outstanding into Salesforce when the fields between the two systems aren’t intuitively mapped to each other? Figuring that out is part of your integration and complexity journey.
- ✓ **Usage increases, data errors, and duplication:** As your Salesforce usage grows, the very nature of lots of humans updating data means there will be data errors and duplication. You may be incented to integrate systems efficiently, but your Salesforce users aren’t. Sales quotas, lead conversion rates, campaign effectiveness ROI, and case backlog are some examples of typical motivators for your stakeholders. They’re rushing to update a ton of information in Salesforce, and if they find duplicate data, they’re not going to spend much time tracking down which record is the right one to use.

- ✓ **Customizing data models:** Customizations to your native Salesforce data model can come from different groups that may not always be motivated to care about the consequences of such requests. A change in one object could affect several groups if collaboration is lacking prior to implementation. One common work-around is to gather duplicative data for one group, because they may not be motivated to collaborate with another group asking for similar customizations, or compromise toward a more efficient solution.
- ✓ **Add applications:** Integrate with other cloud apps or modules that require information captured in a certain format, so it fits into the design of the third-party product. For example, you may find that your CPQ product captures quote information in a number field, not a currency field, which can make life interesting if your team sells in multiple currencies.
- ✓ **Acquisition or new country:** Changes to a business original sales model as a result of mergers and acquisitions or expansions into new geographic regions mean that former ways of capturing information may no longer fit in the new world.

Note: Though the milestones in Figure 3-1 are displayed in ascending order of complexity, they may not always happen sequentially over time. Your company may have just acquired another company that also uses Salesforce before your IT team is scheduled to roll out an accounting system integration with Salesforce. In between these events, you may have that lone wolf sales rep or outbound sales development manager import a few thousand leads from his last sales job into your system. Some Salesforce integration situations are more complex than others, so be prepared. Check out Chapter 2 for a recommended general hierarchy to fulfilling your company's data needs.

Preparing a Salesforce Integration Strategy

As your Salesforce integration needs get more complex, the number of different departments that you work with will increase. This also means that instead of having an

administrator just install an AppExchange package and set some API passwords to form an out-of-the-box integration, you have to be more aware of details before a successful deployment. Project teams may need to be formed, so the right subject matter experts can share information with you. Don't think it's necessary? Maybe a formal project team isn't always needed, but people are often surprised at how complex certain processes are when they start looking under the hood. Proper preparation helps you identify major technology issues and open discussions items that business users need to resolve.

Recognizing key stakeholders

It helps to know what business gains the company will get if this integration occurs. Make sure you know who has skin in the game to make this project succeed. Ask yourself the following questions:

- ✔ **Who is your executive sponsor?** This person will be motivated to help you push through logjams and weigh in on decisions that need tie-breaking. Though he or she may not know all the details of the project, that individual should have oversight and a clear prioritization of your project.
- ✔ **Which departments or business teams need to be involved?** Some will be directly affected by the details of the project; others may need to be informed as changes affect processes further along a life cycle.
- ✔ **For those departments that will engage in the project, who is the primary point of contact?** Can you clearly state what his/her role will be, so clear expectations are set? Is this contact empowered to make decisions for that team? If not, what needs to happen to have a team's primary decision maker participate?
- ✔ **Which business unit representatives will be your main points of contact for day-to-day aspects of the project?** This may involve task management and getting in some very important-but-detailed weeds. Depending on the size of your company, this person may also be the decision maker; other times, this person will be the right hand (not literally) for the business unit's primary contact.

Identifying key systems for the project

Make sure you know all the systems and sources of data involved in your project. Good listening skills are needed here because some stakeholders will make general references to certain data assuming it's in a certain system, while another team may use the same nouns to describe similar data in a completely different system. Get as specific as possible with your stakeholders when asking these questions:

- ✓ When are users doing a lot of manual work in Excel? Are they taking exports from two different systems (which ones?) and trying to merge them together manually? How much time is this taking them per week? Per month?
- ✓ If your business is growing, has this increased the workload of the people doing these manual processes? How are they trying to keep up? What sorts of known problems have been happening as a result? How costly are those problems, either in time spent making fixes, or trying to perform a root cause analysis several phases later?
- ✓ Outside of people's hard drives, what other systems are involved? Are any of them cloud-based? Is any information needed from legacy systems?
- ✓ Is there a sense of urgency in accessing the data in real-time? For example if you have an e-commerce site, you'll need a real-time update of your inventory; otherwise people will be ordering that deal of the day, when in fact it's already on back-order.

Assessing the data and its use cases

Ask the right questions from your stakeholders to understand the business processes that make access to this data a necessity. Make sure you ask both business unit decision makers and the “boots-on-the-ground” front line people who use the data. You'll hopefully get some complementary (and not contradictory!) insights.



Check out the following tips:

- ✓ Confirm where the data someone is using comes from. You may get an initial answer that is vague (“I get it attached in an email each Monday from Ajay.”). Go to that source and ask where he gets the data. Keep following the scent until someone identifies the actual computer system that houses this information.
- ✓ Ask if all data that’s being received is actually being used. Sometimes someone will just say, “I just look at Column B and match it with Column X in my spreadsheet.” Why or why not?
- ✓ Listen for mentions of information that people need that they aren’t getting from any system. Or maybe they’re getting one form of data but need to do a lot of manual manipulation before it appears in a different format that is useful for their needs. Ascertain how much time is spent manually transforming that data into a usable format.
- ✓ Get your hands on some examples of data that people are using. Get samples both in the raw, “before” state, and the “after” state when someone has adjusted it to his needs. Does the data look fairly standardized (like field information came from a pick list), or calculated (like formula fields), or is it free-form text entered by human beings? How consistent do values look?

Discerning better ways to integrate your data

If you’ve been reading the chapter straight through, you’ve seen the processes of identifying the key stakeholders and primary end-user representatives, reviewing the various systems involved, and interviewing users to hear what’s working well and what isn’t. So now think about ways to reduce their pain, while ensuring a successful and painless integration process. It helps to list out all the business’s needs and pain points and then group them into common themes.

Ask the following questions:

- ✓ Do you see several similar integration needs that could be rolled into one project, for efficiency gains? Or maybe you see several increasingly complex needs on the horizon, and want to lay out an integration road map to ensure the right resources are available when the time comes.

- ✓ Have you identified other potential integration projects that could provide value to the business? These can help a business stakeholder with his strategic planning needs.
- ✓ What data needs to be integrated regularly? Between which systems? How often? You can do a quick back-of-the-envelope estimate on the amount of time each person has to take to manually update or change data, each month, and see if there's any room for a payoff that can be had by investing a certain amount of time to automate the integrations.

Maybe you've got the technical solutions all figured out, but have been delayed by the human factor. If business groups are disagreeing about approaches, and have reached an impasse, you may want to consider whether a neutral third-party consultant should be brought in to facilitate. If that's not in your budget, find the internal team that usually serves as Switzerland to help broker a peace treaty.

Picking Salesforce integration tools that fit your budget

Before you start looking for tools to help with your Salesforce integration needs, figure out what your budget is. Of course, depending on the size and stage of your company and which department you're in, how much is allocated to this endeavor won't always be a crystal ball. Generally it's a combination of information that you need to get internally and from talking to a few vendors. How frugal is your company in general? How costly has the lack of integration been perceived by those that can help approve estimates for you? Are you able to provide some calculations of time or money lost? Though some integration tool vendors may hide pricing from you on their website, those on board the cloud train should show list pricing so you have an idea of whether their solution is in the ballpark for your company.

As you think about your budgetary needs for integration, organize your estimates into different buckets:

- ✓ **Initial integration efforts:** You'll need to consider all upfront costs of buying a tool, and sniff around for hidden costs. Is it mandatory to have a consulting implementation

in addition to licensing costs? Or to have a support or training package? Are there different user licenses (at different pricing tiers)? Is there any additional charge for the amount of usage (think of your home's gas and electric bill), in addition to license costs? Think of internal resources. Does an existing person have the time and bandwidth to own the project, and/or actually own the tool and the configurations that go in it? If he's not super technical but can think logically, is he qualified to use the tool? Or do you need to look at engineering headcount?

✓ **Maintenance of data:** Once your integration tool has helped with remedying your initial data complexity needs, how often does the state of your data need to be assessed? If you're spending money on a tool while detrimental business processes that caused the issues in the first place are still happening, you'll need to assess how those problems impact you as the business grows. Do you have any needs to always be validating data before it gets saved in your systems?

✓ **Available resources:** How often will someone need to monitor, adjust, or roll out new settings in your integration tool, to reflect changing business needs? Does this person have experience in the tool? Is someone interested but needs to enroll in the vendor's training courses? Can you guarantee the availability of that person? Or perhaps you need to budget in an additional headcount for future data stewardship.

✓ **Investment horizon:** Are you in need of a very quick, cheap fix that everyone acknowledges is a temporary Band-Aid? Or are there enough integration experts in your company who have done things a certain way and know what sort of data management system or vendor they want to grow with their needs over time? Perhaps your situation is something in between, especially if you're just starting out. You might want to make some educated and quick decisions around alleviating a current pain point that won't need several levels of budgetary approval, while getting more familiar with upcoming data complexity milestones.

Of course, answers to these questions, and the extent to which you use all topics mentioned here, will depend on the scope of your integration efforts, and your company's nuances.

Chapter 4

Prioritizing Your Salesforce Integration Road Map

In This Chapter

- ▶ Triaging your integration projects
- ▶ Evaluating Salesforce integration vendor solutions

Oftentimes, your company will have multiple integration needs that have to be handled almost simultaneously. Your marketing department may have challenges with synchronizing lead opt-out information between Salesforce and its marketing automation system. At the same time, Sales, Support, and Finance want to integrate customer payment information so the support agents and account managers can quickly see this when talking with tier 2 customers. Every stakeholder's priority is highest (to them, anyway), and there are only so many of you and your team available to work on these requests. It's best to gather the right information to help prioritize and plan out when projects are slated to occur.

Realizing the Business Benefits of Salesforce Integration

Requests that align with team-, organization-, or company-wide benefits generally get prioritized over other improvements, so rank requests with the following guidelines:

- ✓ Understand the key business goals as defined by executive management. Each organization may have different details to execute in support of core shared objectives. Plan to tell your executive sponsor which higher prioritized (or all)

integration projects (and non-integration ones!) are tied to what objectives.

- Generally know what those objectives will need, as far as people and processes, in order to be met. What involvement is needed from the business units that you support? Can you anticipate what their needs will be from you? Confirm needs by keeping the lines of communication open with the associated stakeholders.
- Identify the users that will be using, creating, and maintaining the needed data. How important is their access to the data on Day 1 of a new initiative? Depending on the size and scope of the project at hand, stakeholders may acknowledge that manual updates of information are acceptable but that automated updates need to happen shortly thereafter. Probe to see what people just need to see information, versus alter it, create it, or delete it.
- Recognize people’s expectations of the trustworthiness of the data. A new business objective may now suddenly require access to customer information in Salesforce. Field X may already be in there but without a lot of discipline in filling it out or updating it once it’s changed. Not only should you be aware that this information is already in Salesforce, but also you now have to determine a data strategy that involves improving its accuracy (which may or may not include the unreliable data that already exists in that field today).

Armed with this information, you can represent your projects in a matrix that shows how they compare with one another when assessed against the business value delivered and effort and investment needed. See an example of evaluating your integration projects in Figure 4-1.



Figure 4-1: Evaluating your integration projects.

Selecting Salesforce Integration Solutions

As you start to evaluate integration solutions, there are some key areas to review before making a purchase.

Cloud or on-premises offering

If you're using Salesforce, you're hopefully seeing the benefits of not maintaining the hardware and supporting software in-house. Some of you will still have traditional software solutions (a.k.a. "on premises" since they reside on your premises). Do you want your integration solution to be cloud-based or traditional software that needs to be installed on servers or laptops? Often, your IT apps environment will have cloud and on-premises apps (also known as a hybrid environment), and it could be important that you have an integration solution designed for hybrid.

Multi-tenant or hosted

Not everyone's cloud is the same. When evaluating a cloud-based solution, get details about how your data will live in the cloud. A "multi-tenant application" allows every company that uses the product to have access to just its own data while also enjoying the cost-savings that come by sharing of the same cloud application.

Think of an apartment building that houses multiple tenants. Residents of the complex live in their own units in exchange for a fixed monthly cost. But they also benefit from economies of scale that the building can negotiate, like with water, garbage, and cable TV rates. Back in the world of multi-tenant cloud solutions, customers benefit from seamless hardware and software upgrades that happen with little to no disruption to their use of the product. They also benefit from whatever security measures that the vendor has deployed to ensure their data is safe and passes the bar for their biggest, pickiest customers.

A hosted offering can be both private (within your company) and public. Somewhere, someone has installed a hardware appliance and a stack of infrastructure software for your

specific needs. Though this replaces the work that your IT department would have done, there is no sharing of the hardware and software maintenance with other customers. When it's time to upgrade all the vendor's customers, you'll have to wait your turn. Make sure you ask how often the vendor delivers new releases and upgrades. Know how you can monitor system usage and adoption for your particular instance.

Ease of use

Make sure your solution is intuitive. The user interface should be understandable by business or technical users, depending on the problem and approach. Use a wizard-based interface where goals can be met in simple steps, like in the Mapping Configuration Task Wizard in Figure 4-2, and there should be little need for engineering to get involved in delivering the majority of your needs. Of course, the solution should also allow for custom extensions when super complicated problems demand a specific technical approach to an integration scenario.



Find out how new customers are on-boarded. Look on LinkedIn groups or the vendor's online forums for customer comments. Ask how much training is generally required. How intuitive is the vendor's help information? Is there a strong network of peer users on a community site that you can use without relying on the vendor's support agents?



Figure 4-2: Evaluating a solution's user interface.

Try and buy versus rapid deployment

Look for the ability to trial the vendor's product for a short amount of time so you can roll up your sleeves and test some specific approaches to solving some of your business challenges. Being able to kick the tires and take the trial out for a test drive should be a huge help in understanding a product's ease of use. If the vendor resists having you manually interact with or configure a product, that's a warning sign that the vendor may not want you to see how complicated the product is.



A slick demo that a vendor pre-tailors for your business also doesn't count. People can make any demos look pretty, but you need to scratch beneath the surface. Also be wary of scenarios where you have to pay money first for a small pilot or proof of concept, or if the vendor has to deliver a hardware appliance to you first. These are some warning signs that the solution isn't following the general ease-of-use and multi-tenant architecture characteristics of cloud-based solutions.

Technical or business usage

Chances are you don't want just the super techie folks in IT to use your integration tool. Business users should have access to it, to design their own process flows, or configure their own criteria. Ideally a solution supports both types of users, with a DIY (do-it-yourself) design that optimizes the user experience for both business users (for example, with wizards and a point-and-click user interface) and technical users who may need to configure or even code advanced functionality. For typical Salesforce integration scenarios, most of the needs can be addressed by line of business users themselves, with bigger, hairier needs requiring more technical involvement. Ask who the users of the service generally are, and what skillsets are needed for which functionality. Are you able to deliver a subset of permissions to business users, so they can self-service without risking changing settings they shouldn't be changing?

Connectivity

All Salesforce integration projects usually involve some sort of external data that you want to bring into Salesforce or maybe an external reporting system that you need to bring Salesforce data into. In every case, you need connectivity — that is, pre-built connectors that move data from/to Salesforce for those external data sources and systems. You need to make sure that your integration solution comes with all the pre-built cloud and on-premises connectors that your business requirements need (and not just for a current project but also for future needs). Pre-built connectivity can save you a lot of time and cost in getting your Salesforce integration up and running. These connectors can also provide built-in best practices for how to map external data into Salesforce and even how to keep the data consistent for use in Salesforce.

Scalability

With your list of integration projects identified and prioritized, what sort of solution do you need today versus next quarter, in six months, or a year? Is it worth it to buy a point solution now and go through vendor evaluations again in the near future? Or can you find a vendor with a solution for your current needs that offers additional functionality later for when your data complexity needs grow?

Vendor legitimacy

As a strong integration foundation is what's needed to lead you to an ultimately optimized Salesforce environment, don't forget to assess vendors' viability. How long have they been in business? What feedback do you hear about the vendors on community forums and amongst peers? What's their financial track record been like? Do they develop their technology in-house, acquire it all, or something in between? Look for customer and industry analyst references.

Chapter 5

Learning from Your Peers

In This Chapter

- ▶ Understanding other companies' Salesforce integration scenarios
- ▶ Learning why other companies chose their Salesforce integration tool

Congratulate yourself on the Salesforce integration journey that you and your company are embarking on. You're not alone on this journey — companies of many sizes and in a variety of industries have faced similar issues with data complexity. In this chapter, you get some examples of how other companies integrated Salesforce into their enterprises.

Importing Data in Bulk

Many free data loading tools exist that let you bulk-import or update information into Salesforce in small volumes from a basic source like a .CSV file. A global investment management software company was using one of those. However, it outgrew this solution and needed more feedback on the imports ("monitoring"). In addition, if any data didn't make it into Salesforce, the company needed an automatic notification of those failures.

It chose a vendor whose tool supported high volume data loading from multiple sources and also delivered data monitoring and notifications. Additionally, the tool provided an easy-to-use interface and allowed easy graphical mapping between data. Now that the software company isn't caught unaware with data loads, it's able to focus on other integration projects of increasing data complexity.

Integrating Salesforce and Back Office Systems

A global imaging products company had its entire Australian sales teams on Salesforce. However, primary sales data for leads, orders, and assets deployed in the field was all housed in Oracle E-Business Suite, which was the ERP platform. The sales team members couldn't access sales data quickly enough, which made decision making inefficient and affected response times in competitive sales situations. After they had the info, they had to send their customers' orders manually to the order administration team (via an email). The order administration team had to then manually enter this information into the ERP system.

The company ended up choosing an integration vendor that gave them two-way ("bidirectional") connectivity between Salesforce and Oracle E-Business, so the data is updated every hour. The vendor's pre-built connector provided default cloud integration between the two systems, which also reduced the need for extensive development effort. The sales team, along with staff in this company's credit control, operations, and administration groups, is now able to get a complete view of all data related to a business deal and increase deal closure rates.

Real-Time Application Integration

The Affordable Care Act is driving millions of uninsured Americans to sign up for health coverage. A major health insurer wanted to capitalize on this new market opportunity and used Salesforce to manage a call-center-based marketing campaign that received inbound calls from targeted individuals. The company needed to hire hundreds of call center agents and train them on Salesforce and healthcare insurance policies, all in a matter of months.

The agency used a real-time app integration tool to create process applications on the Salesforce platform. When an inbound call comes in, the real-time process application is

triggered and then integrates with on-premises systems to pull any information already known about the caller. After the customer info is integrated into the agent's Salesforce screen, the app integrates with additional content stored in Salesforce to guide the call center agent through the entire phone call without the need for in-depth training. The end-to-end real-time integration with Salesforce has enabled the health insurer to quickly ramp up additional agents, seamlessly integrate Salesforce with legacy and on-premises systems, and handle thousands of daily customer inquiries.

Connecting Salesforce and In-House Systems

An NBA basketball franchise needed a way to track game attendance, the success of promotional campaigns, reward values for customers, and special services to VIPs in one cloud-based system. Several in-house systems — from ticketing to merchandising to youth-centered basketball camp systems — housed this information. Additionally, this team needed to get the integration project up and running during its very short off season.

Salesforce consolidated all the data from these various in-house systems. The solution had to deliver the right data to this team's public websites without negatively affecting the fan experience. An integration tool was selected to provide real-time integrations of data across Salesforce, various Salesforce AppExchange add-ons, in-house systems, their public-facing merchandising, youth basketball camp, and season and individual ticket sales websites. It also had to be straightforward enough to not require extensive engineering resources, given the small window between pro basketball seasons.

Managing Data Complexity with Limited Resources

A small business focused on outsourced healthcare services for government-sponsored healthcare needed a more efficient and scalable way to manage all the data it received from various state

and federal government agencies. For example, it might receive a file listing 2,800,000 healthcare provider names that it'd have to transform into a format it could move between different databases. Add in large files from other government agencies, and it also had to spend time consolidating all the files into a consistent format. The company also had no in-house IT or database administrator staff to design a way to process this consolidation in batch, or to automate a way to cleanse the data.

After evaluating whether it should hire a resource to assist with this, or use a tool that could be used by its existing personnel, the company went with a cloud-based integration tool. It could scrub and consolidate large amounts of data into Salesforce, as the unifying view of information across all those databases. The business user who had to set this up was a company executive and needed a tool with a quick learning curve and strong set of user guides and a community of peers. He found a tool with strong training and help resources that let him create the consolidating and scrubbing tasks himself in a matter of days instead of months if he were to subcontract all this to a developer.

Adhering to Regulatory Needs

A medium-size Swiss pharmaceutical company used Salesforce and needed to integrate it with various systems, like its data warehouse, while sticking to strict regulatory requirements in its industry. Physician information had to be accurately updated for regulatory purposes and the data needed to be replicated into Salesforce for the company's growing sales staff. The fast-growing company also wanted to make sure that an integration tool could grow with it, as it foresaw increasing data complexity needs.

The company ended up picking an integration tool that could replicate the physician's data between systems. The system architect was testing out the tool in his Salesforce sandbox the day after the company got the sandbox. Without any prior experience with that tool, and within five minutes, he had the replication up and running just by following the intuitive wizard. This simple data replication step is one of many integration processes that he's been able to automate, which has freed up a lot of time from other staff members who were previously part of several manual processes.

Chapter 6

Ten Do's and Don'ts When Evaluating a Salesforce Integration Solution



In This Chapter

- ▶ Reviewing key criteria when selecting a Salesforce integration tool
- ▶ Evaluating your integration tool with a purpose in mind



If you've dutifully read all the previous chapters in this book and your head is swimming with various Salesforce integration opportunities, this chapter gives you a nice concise list of the most important points. If you happened to skip right to the end to get the highlights, you can always return to the details later.

Do Have a Data Integration Plan

Before you begin seriously talking to vendors, especially at a large conference, make sure you've prioritized the big integration projects and smaller ones that your company needs. Have an idea who would be using the tool, as this will help as you gather information, perform proof-of-concept analysis, evaluate ease of use, and determine how many licenses you need.

Do Have Budget Allocated

Have an idea of what you realistically can spend. Or have an estimate of the costs being currently spent with inefficient processes that could be saved with a tool. Vendors may not immediately give you a straight answer but may give you a ballpark. Be sure to ask questions to uncover potential hidden costs.

Do Sign Up for Trials

As long as you have a plan of what sort of integration you're going to test and sample, sign up for a trial of various vendors to see how each one achieves the same task. You shouldn't be required to pay for a proof of concept in a tool, and you should be allowed to get your hands on the product and configure it yourself.

Don't Think All Solutions Are Alike

Try to perform a few clear tasks with each tool, and compare results with your expected outcomes. Where are things the same? Different? What system seems to be faster or slower? Compare online help and training sections. Evaluate online communities. How does each vendor try to answer your questions?

Don't Ignore Security, Compliance, and Performance Needs

In your trial, test the process of giving access to other users. Can that person have less access than the administrator but still have her goals met with the tool? What if two end-users need different access levels? If you have to monitor a user, is

there an audit trail of her login history? Can you de-activate or delete a user? Remember your particular industry's regulatory and compliance needs and whether the tool can accommodate those. Try to use the tool for a large sample bulk upload (in your sandbox systems of course!). Is one tool's performance noticeably different than another's?

Don't Forget to Network with Peers

Conferences (like Dreamforce) are a great place to meet peers who more often than not will have a Salesforce integration story to share. Don't be afraid to strike up a conversation, or go to targeted networking events to get stories of other people's experiences using various tools.

Do Find a Tool with Pre-Built Connectors to Other Systems

One large reason to have this option is that it relieves your technical resources from having to start from scratch when building a common integration. You're not the only business with SAP, Oracle, NetSuite, Workday, or Marketo in-house, so why not borrow from the wisdom of others as a launching point?

Do Value an Intuitive Interface

Are there wizards for the majority of integration needs you have? How difficult is it to initially set up connections between systems? Can it replicate your business process flows easily? Are you spending hours versus minutes trying to figure something out? Make sure other end-users are involved during the trial. The experience has to make sense to them, too.

Do Find a Tool That Works for Business and Technical Users

As with your business users, also involve more technical users in the evaluation. If their skills are called on to perform a custom integration to an in-house system, how would they set that up in the system? Get their feedback too, especially if this is their first time with the tool or a cloud-based integration solution.

Do Look for a Tool That Grows with Your Needs

Maybe your first integration project involves data that's not so complex. Depending on the state of your business and its growth, do you see that being the case in six months or a year? I definitely don't advocate overpaying for a feature set that will lay dormant for months. However, look for the ability to turn on or graduate to additional functionality as your needs mature. That will save you from having to rebuild process rules and configurations in a new tool, and getting yourself and end-users used to a new system.



Put potential to work.™

Remember when Salesforce was easy?

That was probably before your company went multi-national. And before you acquired three companies. Before your sales team quadrupled in size. As Salesforce integrates more deeply into your business, your business can't ignore the need to manage the underlying data.

Tame Salesforce Complexity

Informatica Cloud connects more data every day through Salesforce integration than any other vendor and offers the broadest set of cloud services designed for every phase of your Salesforce data lifecycle. Get Salesforce right for your business. With Informatica.

Visit informaticacloud.com to learn more.

Integrate Salesforce with the key systems in your organization

Salesforce's ease of use is responsible for both its widespread adoption and expansion throughout businesses as well as the speed with which poorly planned configurations can become unnecessarily complex business system designs. This book shows you how to

- *Optimize the role of Salesforce in your company — deal with data complexity*
- *Navigate your Salesforce integration life cycle — manage your usage growth*
- *Evaluate vendor solutions — review key areas before purchasing*
- *Gather the right information — help prioritize and plan out your projects' timelines*



Open the book and find:

- The business benefits to Salesforce integration
- How to prepare the scope of your integration strategy
- What characteristics to look for in integration tools
- Ways other companies have integrated Salesforce
- Ten do's and don'ts of evaluating your Salesforce integration solution

Go to Dummies.com
for videos, step-by-step examples,
how-to articles, or to shop!

WILEY END USER LICENSE AGREEMENT

Go to www.wiley.com/go/eula to access Wiley's ebook EULA.