



# What's in Your Cloud?

Enterprise Integration Playbook: Saving Time with iPaaS

How to get days back in  
your year using integration  
and automation.

TeamDynamix



“ In iPaaS we find the groundwork being laid for a digital future, as the products in this segment generally are lighter, more agile IT infrastructure suited for the rapidly evolving use cases around digital business.”

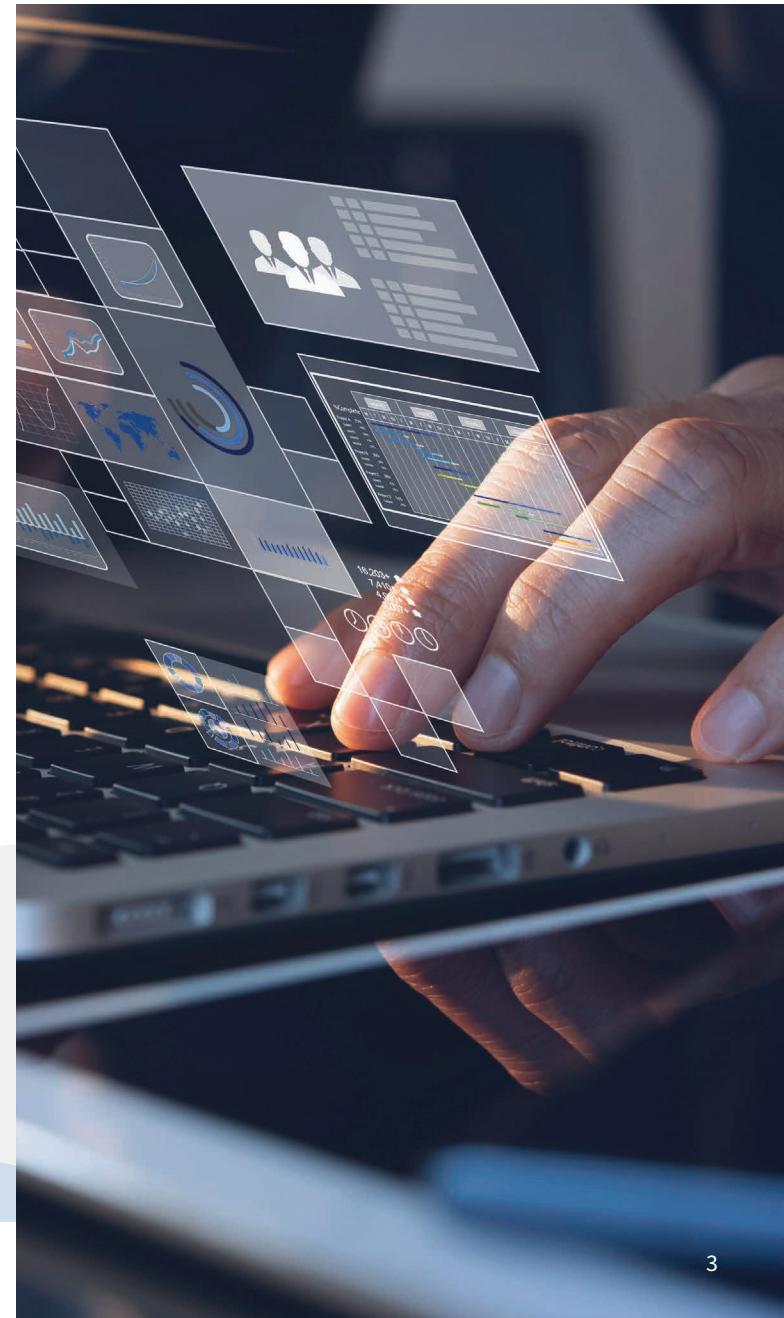
– BINDI BHULLAR, Research Director, Gartner

# Proliferation of Departmental Applications Driving Need for Enterprise Integration Platforms

The current tech landscape at most companies is vast. With new tools and platforms coming to market daily, it's easy to see why companies are using upwards of 300 apps and hundreds of APIs DAILY to connect systems and tech stacks throughout different departments and lines of business. The rise of cloud-based SaaS has enabled employees in every area of business to build their own tech stack – from HR to Marketing, Sales to Finance, even Facilities. And because many of these promise ease of use and the benefit of solving problems to save time – many departments jump on board. The result, however, is that each department operates using their individual tech stacks often with no transparency outside of their own departments. These disparate tech stacks create problems as the tech gets more siloed and businesses lack a centralized system bringing all the data together.

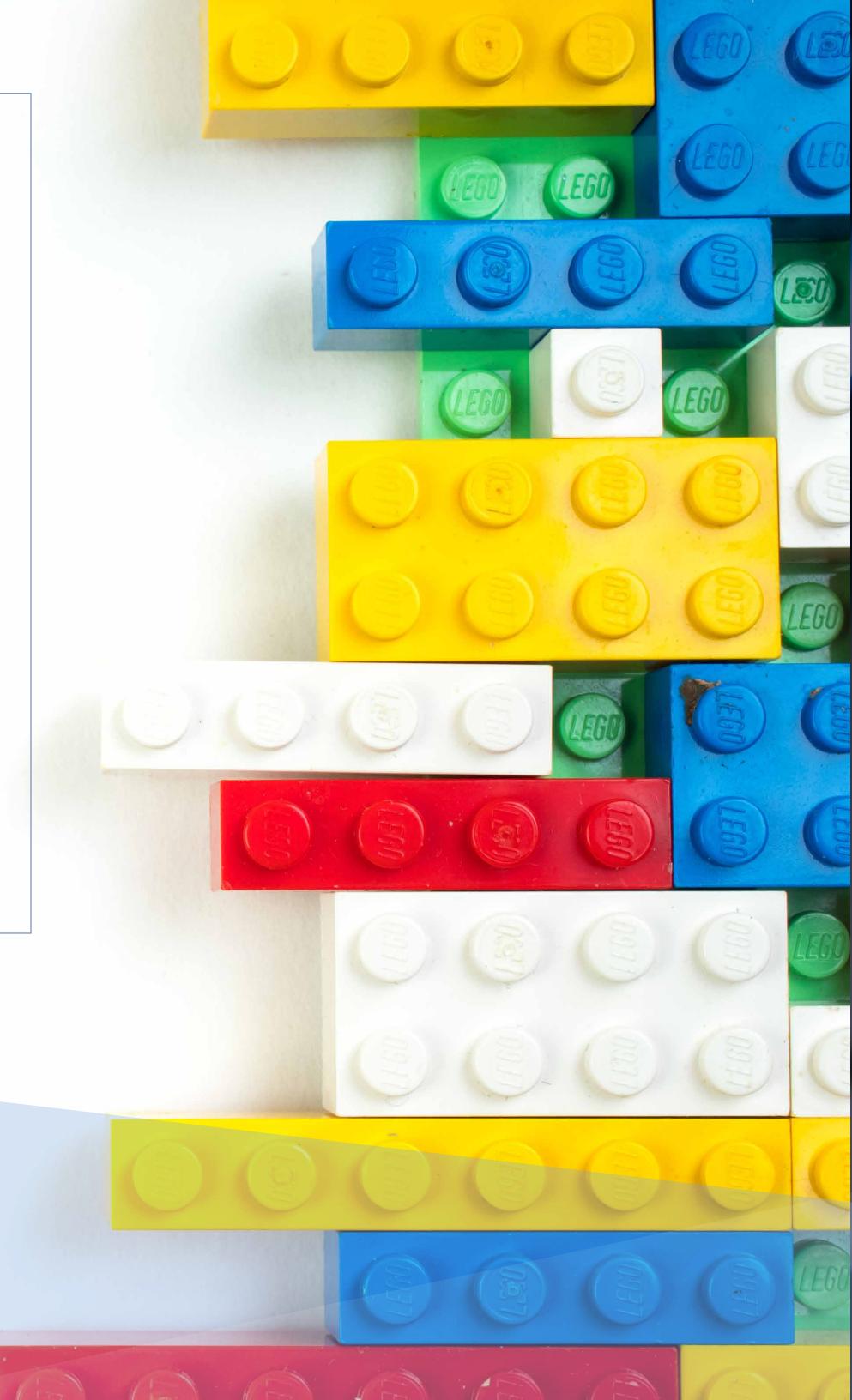
## That's where iPaaS comes in.

Using a single platform to integrate all your tools and APIs AND create workflows to automate both simple and complex processes can not only save your employees time, but it can save your resources and money. The best part is, iPaaS tools often feature easy-to-use click and drag functionality meaning you don't need a dedicated employee building integrations and workflows. Instead, you can power your existing teams – no coding experience needed.



“ I like to call iPaaS ‘Lego programming’ because you just snap everything together and it works.”

- DAVID MITCHELL  
Enterprise Applications Administrator  
WesternU



# Wrangling Disparate Applications and Rouge APIs

It's no secret using APIs pose a serious security risk to organizations. They are easy doors for hackers to work their way into a company's systems if they aren't properly set up and monitored. And with each department within a company using their own APIs to connect their individual tech stacks, it's only a matter of time before someone tries to exploit an API connection. By using a platform like iPaaS to integrate all your tools and systems, you can wrangle all the API connections within your organization, monitor the data flowing in and out, and even set up workflows to automate both simple and complex tasks within every department.

## But My Tools Already Integrate with Systems, Why Do I Need Another?

Yes, many SaaS tools have integration points and even proprietary workflow engines. CRM platforms naturally integrate with your marketing automation tools, HR systems will integrate with recruiting applications, etc. But the problem is that each one of these integration points is built from application to application and the workflow is then built inside of each application - using proprietary workflow engines. These types of integrations, often built using APIs, aren't sustainable for most businesses. In most cases, these integrations only exist within each individual tech stack – the workflows built using the native integrations only impact the tools being used within HR for example. That means if HR wants to build a full onboarding workflow it will only impact the onboarding steps HR is responsible for. With an iPaaS tool, you can work smarter and build a SINGLE workflow for onboarding that's inclusive of the steps that need to be completed in EVERY department – not just HR.

# Why APIs & Custom Workflow Engines Are Not a Viable Solution

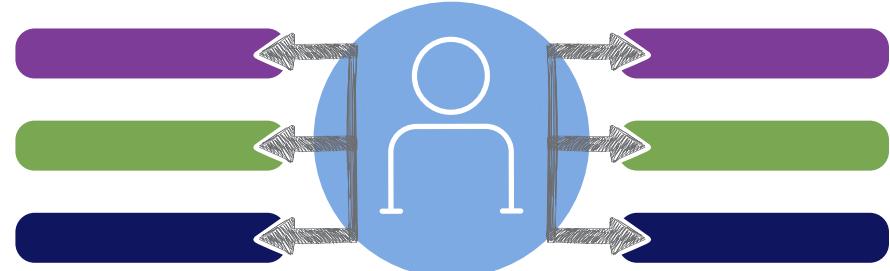


**ONE integration platform with a workflow engine to connect all enterprise applications.**

Imagine instead, you have a single integration platform with a library of connectors to all of your enterprise systems. You can easily move data and build workflows all in one place - for hundreds of applications. You will have better control, governance and the ability to easily audit all data movements within your entire organization.

## Is this sustainable?

Workflow would be built within each individual application and integration points created and maintained. This will cause extra work and longer timelines to execute. It will also present ongoing issues as applications change or update.





“ Having that single source of truth – knowing the data is in sync and valid – is our main focus and why we were so interested in investing in iPaaS.”

– KEN LIBUTTI,  
Chief Information OfficerPalm Beach State College

# Your iPaaS Playbook

The following six flows will illustrate the power of iPaaS for enterprise integration and workflow - saving time and money.

**1**

Consolidate data from many systems to create a single 360-degree view of the Customer.

**2**

Integrate your front-end recruiting app with your back-end HR system.

**3**

Automate onboarding ... from new user creation to setting permissions and more.

**4**

Reduce manual processing in IT operations; automate AD updates, VM provisions and more.

**5**

IT Service Management gets supercharged with your own automation tool.

**6**

Link a PO system with your AP system so that you can match invoices and POs.



# SCENARIO

**The CEO wants an executive summary for 5 clients that he intends to call on next week... you're tasked with doing this weekly.**

# Make Better Decisions with ALL Data Together

## Does this sound familiar?

Your CEO wants to meet a few of your key customers and has asked each CS Manager to provide a comprehensive executive briefing for each customer. The problem? This data lives in 8 different places, and pulling it together is time consuming and relies on multiple resources.

- Financial Data (LTV)
- Customer Survey Scores
- Open Tickets for Support
- Historical Sales Information
- Any Active Deals
- Key Contacts with Background Details

## She needs this by Sunday night.

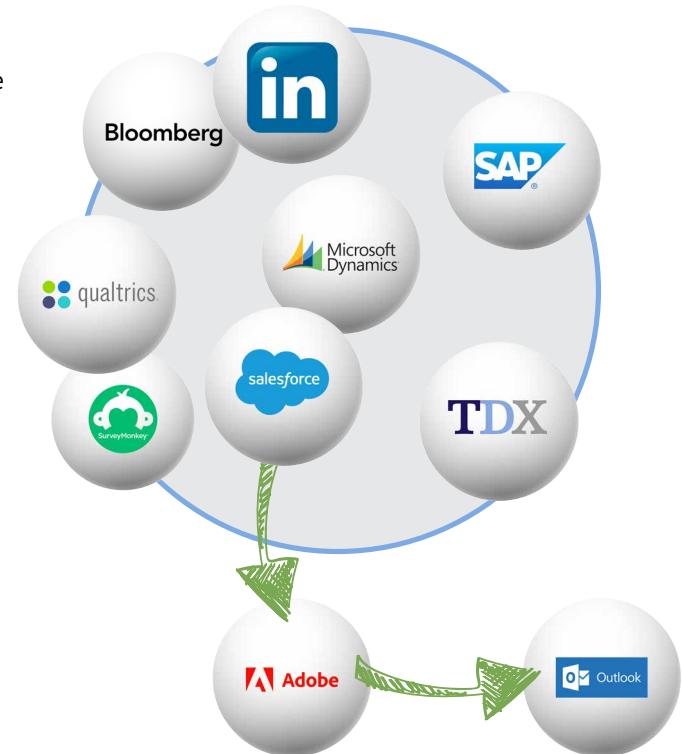
Gathering this data for your CEO requires access to multiple systems - potentially with a need to ask various departments for permissions. With iPaaS, however, the platform could be configured to constantly be pooling these details to one golden record in your CRM - eliminating the need to grant access across multiple systems and departments.

## What if INSTEAD you could:

Click “Generate Executive Report” in SalesForce and have it sent to her – all formatted & accurate!

- Data that resides in multiple places can be harmonized to a single source (SalesForce, a data lake, any holding place). Sometimes referred to as the “**Golden Record**.”
- Data can be placed there using any of these **Process Triggers / Methods** – you will hear these words:

- 1. Event Based** (x changes & sets off a flow)
- 2. Webhooks** (*always listening* for a change)
- 3. Scheduled** (every Monday)
- 4. Polled** (checks periodically for an update)



## So that you can:

- Make smarter decisions
- Be prepared for customer conversations
- Gain valuable insights (employee data, sales, customer, market...)

# SCENARIO

**Talent Recruiters are like salespeople, time is money.  
And right now they are spending too much time  
re-entering information into the different systems  
they use for recruitment and onboarding.**

# Reduce Time Recruiters Spend on Non-Value Tasks

## Does this sound familiar?

You have a new candidate in your ATS (Applicant Tracking System) and you do not know whether they are a former employee or a re-applicant, or is it an internal person applying for the role? You end up **looking up data in another system** (HR) double check so that there are no missteps.

You need to **track the status across multiple systems: your ATS and your HR system** without manually updating and syncing data so that you are able to manage your candidate pool appropriately.

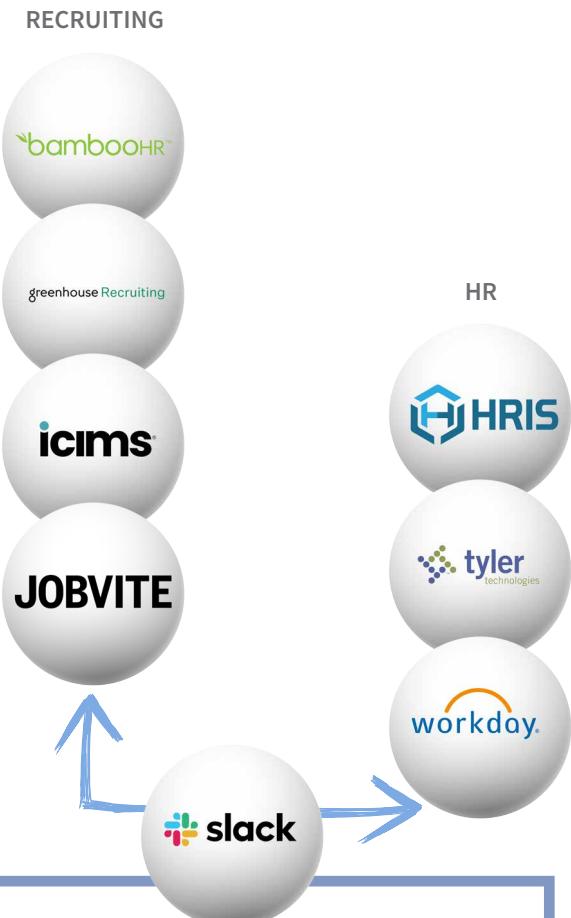
Syncing between the two systems is often manual and error prone, leading to non value adding work for your recruitment team.

When you are ready to make an offer or go to next steps, you are **re-keying data** from one system to the next.

## What if INSTEAD you could:

Once a new applicant enters the ATS:

1. A check is done to see if this person exists already in your HR system. The check can be made against multiple data (name, phone, email, address, to be thorough).
2. Notifications can be sent to alert the recruiter if the applicant is a former or current employee. A flag can be set on the applicant record.
3. As the applicant moves through the process, if the status changes to “OFFER” a **record can be automatically generated in the HR platform** to track the outcome & be staged for onboarding.(see onboarding slide)



## So that you can:

- **Reduce time spent on non-value tasks**
- **Expedite the talent funnel progression**
- **Be more competitive in talent scouting**

# SCENARIO

**New employees are starting weekly and need to be setup in various systems. In addition, HR wants a high touch welcome program. To meet both needs, IT and HR are spending too much time setting up new accounts and sending welcome notes. Information is scattered across systems and critical details are sometimes missing. A backlog is forming, and new hires aren't getting equipment and access to systems on time leaving a bad impression on the first day.**

# Automating Complex Onboarding Processes

## Does this sound familiar?

You are spending too much time on onboarding tasks:

- Creating employee files in ActiveDirectory.
- Sending emails to IT, Finance, etc. making sure the employee has permissions in all the necessary systems.
- Making sure IT provisions a computer and all equipment needed for the new hire.
- Following up with the hiring manager to send a welcome email.
- Meeting with security and facilities so the new hire can enter the building and has a desk to sit at on day one.

## What if we could do this INSTEAD?

1. Create an employee file in one system that sets off a series of updates to various HR systems.
2. Automates notification to appropriate departments and grants permissions to the tools needed.
3. Creates tickets for IT, Security, Facilities to complete their respective tasks.
4. Send a welcome package prior to the new hire's start date welcoming them to the company with a schedule for their first day.



Create Sub Workflows for Each Department



CEO Welcome Note sends automatically to new hire the afternoon of their first day.



# SCENARIO

**IT people need to spend more time on strategic initiatives, not repetitive manual tasks that are quick to do but add up weekly.**

# Reduce Time IT Spends on Non-Value Tasks

## Does this sound familiar?

The IT team is spending too much time on non-value tasks. Often repeating manual processes.

- ActiveDirectory Permission Settings
- Group Management
- Creating a Virtual Machine
- File transfer processes
- Change the status of a people record
  - student to employee
  - student to alumni
- Automate the calling of Powershell scripts

## What if we could do this INSTEAD?

1. Set off a series of updates from one set of instructions vs. going from system to system.
2. Quickly transfer files.
3. Spin up a virtual machine without all the manual processing.
4. Integrate with ticketing so that you can take action from the ticket.



## So that you can:

- Work on more strategic and transformative IT initiatives.

# SCENARIO

**IT Techs need to work on the right tickets, and  
we need special agents on tickets that have more  
difficult end-users.**

# Using Sentiment Analysis to Route IT Service Tickets

## Does this sound familiar?

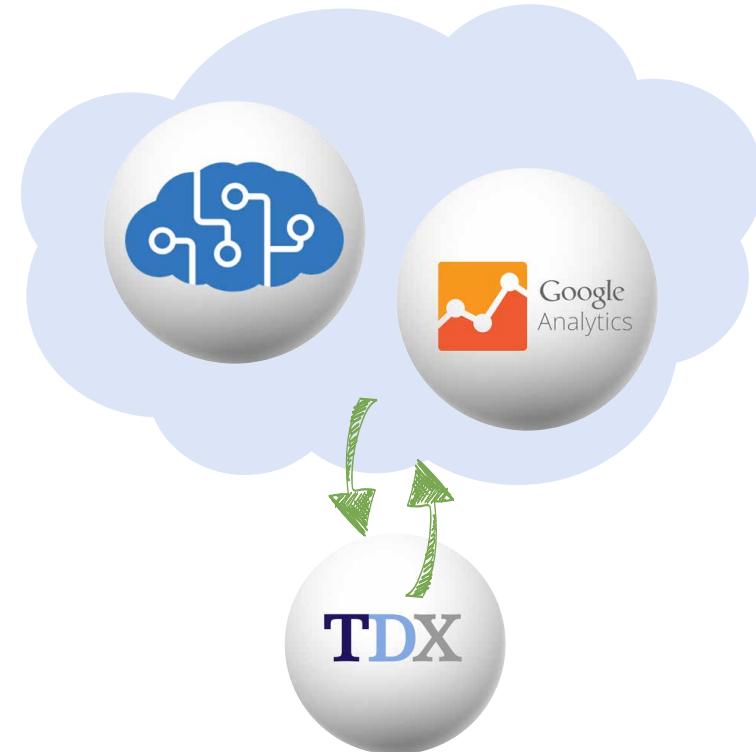
- You have some people on your team that are better at managing more upset customers?
- You want a more senior agent to take the more upset customers?
- Severity levels are not always communicated by status and instead it comes out in the content; how can we find the most critical issues and quickly act?

## What if INSTEAD you could:

The platform will take any new content (service ticket, customer inquiry, inbound contact us form), and bounce it against MS Azure or Google text analytics tools – using this data, the workflow tool can take action or create scores or flags.

- Route to the best agent
- Flag is “Priority”
- Route directly to sales
- Prioritize a work queue

Integrate with best of breed sentiment analysis tools to extract insights, identify key phrases and entities, and develop strategies for providing a great customer experience. Can be used internally too – think about employee feedback.



## So that you can:

- **Resolve tickets faster**
- **Prioritize queues**
- **Improve end-user and technician experience**

# SCENARIO

**Finance never has the right POs to match to invoices and spends too much time tracking down necessary forms.**

# PO & Invoice Routing

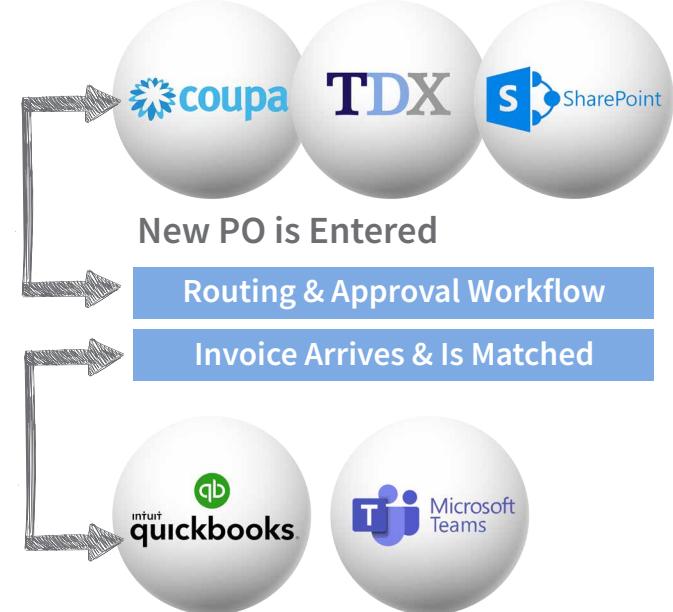
## Does this sound familiar?

- Your process to manage purchase orders is lengthy, manual, prone to delayed approvals, and spans a range of applications.
- Your procurement team spends a significant portion of their time in managing this process, instead of conducting value adding work such as developing strategic suppliers and refining your department strategy.
- The business is complaining that it takes too long to get a PO Approved.
- Accounting complains that they are getting invoices that are not matched to POs.
- The business cannot tell if an invoice has been paid, and cannot see if the invoices came in over or under the PO amounts to reconcile budgets.

## What if we could do this INSTEAD?

Once a requisition is approved:

1. Create the PO in what ever system you have; could be an ESM like TDX, in SharePoint, in a PO system like Coupa.
2. The PO would route for approval to the business leaders / finance team and get approved.
3. Once the invoice comes in, it gets attached to the PO and routed for payment, once, it is paid, the amount is entered on the PO and the PO status is changed.
4. Alerts / notifications can be built into the process.



## So that you can:

- Improve compliance and financial controls
- Reduce risk of erroneous payments
- Expedite payment processing



# iPaaS in the Real World

Palm Beach State is using TeamDynamix iPaaS to aggregate student data for an improved student experience

- ✓ **Leveraging iPaaS to consolidate data related to the implementation of Workday**
- ✓ **Synchronizing student data to move to the RAVE Mobility Alert System**
- ✓ **Moving continuing education class registrations in Eventbrite to Core LMS System and RAVE Mobility**



“ We didn’t want to build a bunch of point-to-point integrations, rather we wanted to leverage iPaaS to manage all integrations to one data warehouse.

- KEN LIBUTTI, Chief Information Officer



# TeamDynamix



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