

On Demand and Enterprise CRM Integration

*An Alternative Approach to Integrating CRM
Applications*



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Executive Summary

As Customer Relationship Management (CRM) software continues to increase in popularity, the challenge to integrate these systems with other enterprise applications has become critical for many organizations. Companies understand that although CRM applications contain customer information such as company and contact information, they lack vital financial, sales, product, historical, and other important data that is maintained in back-end systems. In order to successfully use CRM to expand customer relationships and grow the business, companies are looking for cost-effective approaches to integrate these systems with CRM.

Several solutions to address both enterprise and on demand (Software as a Service) CRM integration are available. They include

- Purchasing specific native connectors (e.g., Microsoft Office, ERP)
- Writing and using custom code to share data between systems
- Utilizing a third party vendor to develop custom middle-tier architecture
- Developing a *new* application such as a mash-up with a combination of Web Services and custom code

Drawbacks of these strategies include their cost, the need to write code, needless impediments to the evolution of enterprise applications, the additional support burden, increased IT infrastructure (e.g., new servers, increase in bandwidth), and most importantly, the time needed to implement the integrated CRM system.

An alternative approach is to integrate CRM with other enterprise applications using *desktop integration*. Desktop integration approaches CRM systems, regardless if hosted internally or available as Software as a Service (SaaS), as an application that is integrated where it used – at the desktop. This type of integration provides the flexibility not only to integrate data across enterprise systems without writing code, but also provides a framework for streamlining processes as well as a method for updating the user interface. Desktop integration

- Delivers on the “Promise of CRM” with integrated applications, automated business processes and a single view of customer information
- Eliminates the need to write code between CRM applications and back-end systems including legacy applications (Windows, Java, 3270, DOS, etc.)
- Does not require additional infrastructure such as a new middle-tier to share data
- Can be implemented in days without an army of highly specialized programmers
- Extends the benefits of CRM by providing process, data, and visual integration

Whether an organization is using Salesforce.com or has installed Microsoft CRM in their enterprise, desktop integration provides a scalable, flexible, and cohesive solution using a fraction of the time and other resource expenditures required by other approaches.

The Promise of CRM

In an ideal world, every step in a company's CRM-driven sales and service process flows smoothly from the moment a company reaches out to customers with a promotion, all the way through purchasing and receipt of the product and/or service, to any requests for after-sales support. Unfortunately, many CRM solutions have not lived up to the promise of providing a CRM-driven sales and service process with unified views of customers, improved productivity, higher customer satisfaction, increased revenue, and reasonable Return on Investment (ROI)..

New technologies, applications and business acquisitions are not always integrated cleanly, if at all, into the existing CRM solution. After spending the time and money needed to implement CRM, those who have deployed it often discover that while there may be more information about the customer in a central location or that users have access to the convenience of an on demand solution, the many workflows and people required to serve customers are not any more efficient than before. Through process evolution, it becomes clear that just implementing a CRM package may not effectively solve underlying business problems facing the enterprise and their mission critical contact centers. The key issue is not just getting a single view of the customer, it is also about using an integrated, adaptable view to improve sales and service, manage the business and cut costs.

Furthermore, the problem of delivering on the promise of CRM for everyone - integrated applications, automated business processes and a single view of customer information - is too often an expensive multi-year IT project. Add to lengthy implementation times, budget overruns and increased business risk, legacy management, operations and logistics applications, information portals and intranets, SFA and ERP suites, and other integration challenges facing today's companies can seem insurmountable. Several research organizations such as Aberdeen and Gartner now advise businesses to consider application integration from a customer-centric perspective in addition to more traditional infrastructure, middle-tier and server-based approaches. The benefits to this perspective include faster, more thorough application integration at lower cost, higher customer satisfaction (e.g., customers want to know when an order has been shipped) and better, faster alignment of key business, technology and operational objectives.

This is where targeted, integrated CRM comes into the picture. If a company can make all of their customer information available - not merely in one place, but in the right place, to the right employees and at the right time, and make it easy to incorporate that information into sales and service workflows, they will deliver on the promise of CRM. If companies achieve this objective in a stepwise, lower cost, incremental manner, they reach ROI targets, reduce business risk and improve profit.

Integrating CRM

Users get more out of a CRM system, whether it is delivered through Software as a Service (SaaS) or installed as part of an organization's IT portfolio, if it is integrated to other back-end systems such as an order entry, financial and other enterprise applications. Unfortunately, many companies have discovered the limitations of integrating CRM systems with other applications while others are putting off implementing CRM until there are better solutions to address integration. This has been particularly true with on demand systems where the CRM application is hosted at a third party location and accessed through a web browser interface.

Common CRM Integration Approaches

The most common approaches to integrating CRM and back-end systems include purchasing connectors to specific products, creating an integration hub, implementing middleware from third party software vendors, or developing mash-ups and other custom interfaces. Although some systems are integrated over time, there are limitations and drawbacks to these integration approaches including:

- Time – Typical integration projects tend to take months or years to complete thus limiting their effectiveness. The technology or business processes may change making the integration effort obsolete.
- Cost – Efforts to integrate systems can be very costly to begin, implement, and maintain.
- Application Specific – Integration technology may be limited to address specific platforms and/or applications.
- Invasive – The integration effort may involve initial and ongoing modifications to application codes or new applications may need to be developed to complete the effort.
- Downtime – Server-side integration efforts require complicated network infrastructures and increase downtime when integrated systems such as portals are not available.
- Risk – The more complex the solution, the more likely there is for a potential problem with the integrated environment.
- Flexibility – Solutions that integrate systems must be agile to meet ongoing operational needs and changing business requirements. The tools agents use must respond quickly to service issues and be changed in a timely manner when necessary. In the same manner, the technology must be quickly configurable to meet business needs when new products and services are offered.
- Support – These integration approaches increase the support burden on IT and may require additional support infrastructure.

CRM Integration at the Desktop

A better approach to enable a CRM strategy is to integrate applications at the knowledge worker's desktop. Desktop integration is a more effective approach to organizing the work environment, streamlining processes, and reducing the amount of time knowledge workers spend completing tasks. In addition, desktop integration is non-invasive and does not require any server-side integration thus reducing integration costs and lowering CRM implementation time from months to days.

Desktop integration solutions such as Cicero go beyond the more typical server-based solutions by non-invasively exploiting the interaction between the applications and the platform on which they run. Desktop integrations provide three types of integration:

- **Process Integration** – Streamline workflow and business processes by simplifying navigation, eliminating the search for information, and reducing steps in business tasks without writing or altering application code.
- **Data Integration** – Share data between applications and systems, reducing the need to copy/cut and paste or otherwise enter information in one or more applications.
- **Visual Integration** – Provide a logical organization of the information on the end user desktop using pass-through integration where applications are displayed and organized in their native user interface such as in a book and tab metaphor or using overlay integration where a new application such as a composite, mash-up, or dashboard is placed over existing applications. Products such as Cicero also allow organizations to use both pass-through and overlay integration or a combination of the two (mash-ups).

How Does Desktop Integration Work

Desktop integration technologies leverage the relationship and communication that exists between applications and the underlying Microsoft Windows operating system. Using products such as Cicero Studio, a single, comprehensive integration environment, integrators create a logical model or map of each application's elements or objects (such as entry fields and push-buttons) and events (such as mouse clicks) regardless of when the application was created or the programming language that was used. This logical model is created without having to modify or access the source code of any application making this an ideal integration solution for SaaS applications. After mapping each application, the integrator describes the business processes in terms of event-driven workflows using wizards and high-level commands, plugging in the application objects as needed and adding event-driven logic and workflow.

The integrator can create a task-oriented skin using the graphical layout editor or create a new composite application. At run-time, the Cicero Runtime listens for events between the applications and operating system and inserts the integration logic between the application objects (within a single application and across multiple applications) creating the integrated desktop.

Web Services and a Service Oriented Architecture

A Service-Oriented Architecture (SOA) encourages the creation of loosely coupled business services through the integration of disparate applications, regardless of underlying technologies. This leads to greater systems flexibility, quicker time-to-market of new business functions, lower costs, and ultimately, a real competitive advantage.

Desktop integration helps build and deploy SOAs in a fraction of the time and at a fraction of the cost. Instead of spending years rewriting applications to conform to a new architecture, it enables an enterprise to start receiving full benefits of an SOA without a change to the existing core systems.

Web Services is a core component of an SOA and desktop integration software such as Cicero can consume and generate web services. This allows applications and CRM to become full participants in an SOA of loosely-coupled, distributed service providers and consumers.

Process, Data, and Visual CRM Integration

Desktop integration improves customer service by eliminating redundant data entry, streamlining processes, and organizing application screens logically. Fortune 500 companies that use desktop integration in their CRM strategy have also addressed major organizational and training issues related to mergers, acquisitions, and other changing business needs. In contact centers this type of integration has proven invaluable in reducing agent call times, allowing them to focus on cross-sell and up-sell opportunities with customers. Desktop integration also provides additional functionality of an on demand or enterprise CRM solution for enforcing rules related to compliance and business requirements, reducing call transfers, and increasing done-in-one calls. Finally, desktop integration allows companies to be agile in regards to how technology is implemented and used with CRM systems. New applications are easily integrated with legacy systems and the CRM application while only exposing certain screens, data, and processes of those applications for the agent. Consequently, the knowledge worker desktop is organized in a task-oriented environment focused on providing a higher level of service.

For example, a financial services contact center agent receives a call from a user who wants to open a new credit card account based on a recent promotion. Without desktop integration, the agent must complete between eight to nine steps to complete the process (See Figure 1). With desktop integration, nearly half of the steps are automated to complete the same set of tasks shortening the call and improving customer satisfaction. In addition, streamlining processes with desktop integration eliminates potential data entry mistakes, ensures consistency and compliance, and provides additional cross-sell opportunities.

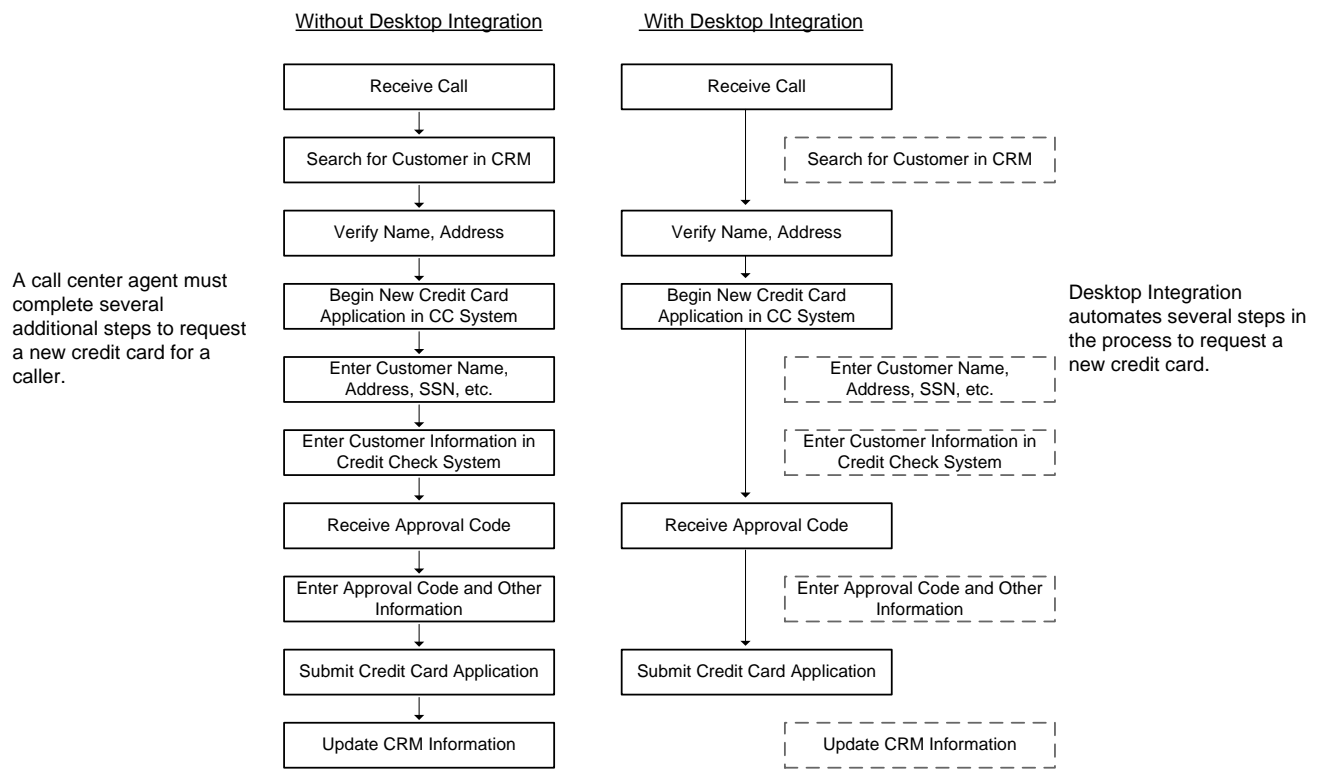


Figure 1 – An Example of Streamlining the Process to Request a New Credit Card

On Demand and Enterprise CRM Integration

Desktop integration also provides a means for enforcing rules related to compliance and business requirements (See Figure 2), enforcing best practices and increasing consistency, improving the quality of each interaction and customer satisfaction. In addition, desktop integration allows companies to be more flexible in regards to how technology is implemented and used. New applications are easily integrated with legacy systems while only exposing those screens, data, and processes of broader applications as necessary for specific knowledge workers and related systems-as-services to support a Service-Oriented Architecture.

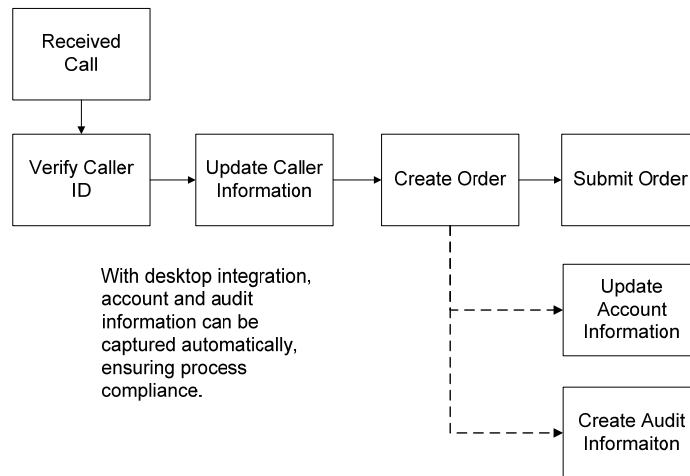


Figure 2 - Desktop Integration completes Additional Processes

Summary

When companies integrate their on demand or enterprise CRM applications with other business systems using desktop integration, they enable the solution to share information with other systems, streamline processes, enforce business rules, and deliver the promised ROI of CRM. Other CRM integration options – application connectors, middleware, integration hubs, mash-ups – are typically more complicated (e.g., adding middleware, custom coding, additional infrastructure, etc.), take longer to implement, increase costs, and are not as agile as desktop integration.

Desktop integration tools such as Cicero treat all applications (and Web Services) in the same manner whether the application is a legacy, Java, Windows, located on the company's premises or accessed through a web browser. This allows the integrator to rapidly integrate data, processes, and the visual appearance of the desktop at the fraction of the time and cost of the other approaches. By approaching CRM integration in this manner, companies are finally realizing the benefits of a CRM-driven sales process, higher customer satisfaction, improved productivity, and an increase in the enterprise's bottom line.

About Cicero, Inc.

Cicero Inc. provides software integration solutions for contact centers and other complex information environments. Cicero solutions align underlying technology with business processes, streamline user interactions, improve total productivity, assure completeness and compliance, reduce turnover, and raise knowledge-worker morale and effectiveness.

Patented Cicero technology quickly and non-invasively integrates disparate applications on the desktop. Cicero integration produces results in weeks, and ROI can be achieved in months. Cicero commits to results which are impossible for invasive, server-side strategies and technologies.

Cicero's technology serves thousands knowledge workers at Merrill Lynch, Nationwide Financial, and others, large and small. In one recent implementation, Cicero integrated eight applications for nine hundred agents' desktops in just seven weeks and reduced average call times by approximately 40 seconds. The results include improved customer service and a \$1+ million per year operating cost reduction. For more information about Cicero, please visit www.ciceroinc.com.