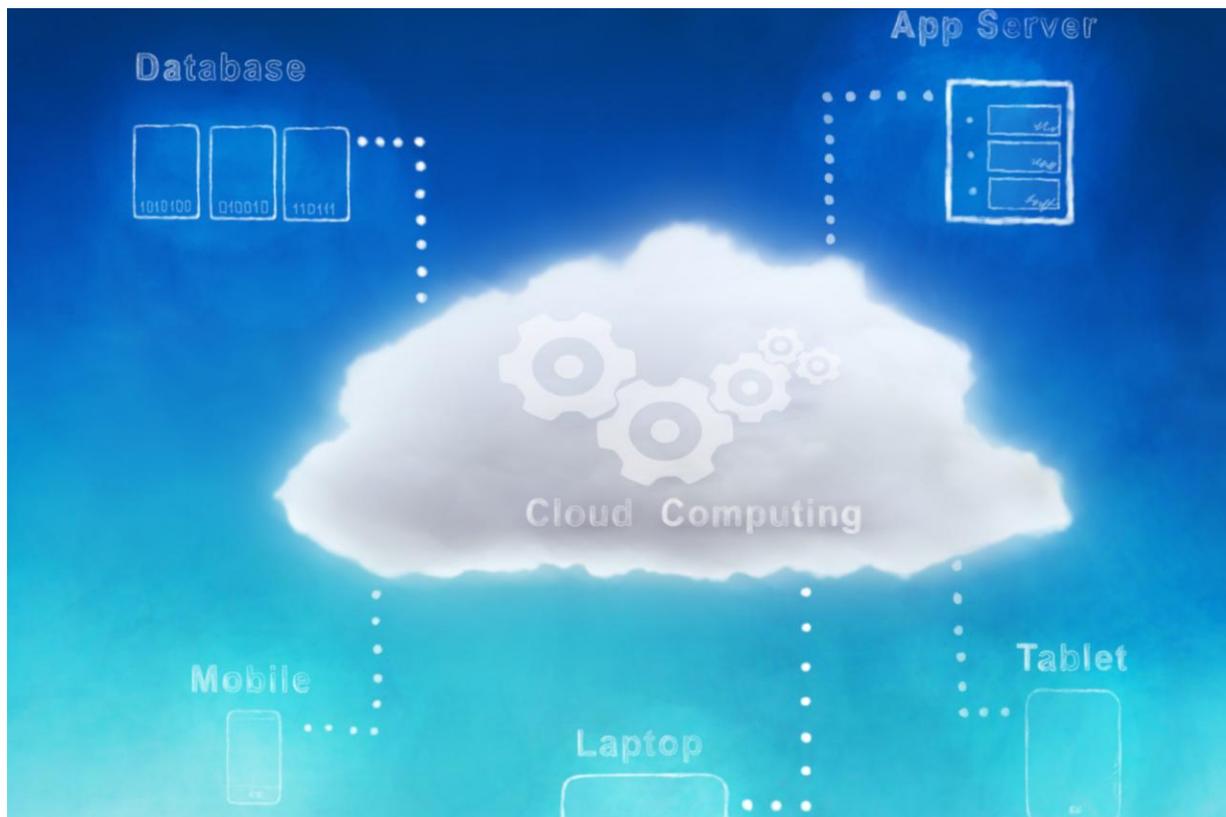


## How to Select a CRM Integration Solution: a User Guide



### Introduction

Selecting the right integration approach for your CRM system may be even more important than you realize. Get it wrong and the costs can be extremely high, both the tangible (such as product costs and implementation fees) as well as the intangible (wasted time, lowered credibility and missed business opportunities). Get it right and you will not only get the best out of your CRM system, you will also have the means to develop a competitive edge.

So how do you plough through the options without getting swamped by all the detail?

Knowing what you want to achieve in a business sense is imperative for starters; a reference point is needed to evaluate against. Then there are practical issues. Do you want to use internal or external experts, or a combination of both? Do you have a corporate tool that you are obliged to use? Would you like to get a purpose designed tool, or have one developed in-house? The answers to these types of questions lay the framework for determining the sorts of solutions you can investigate.

Using tools designed specifically for CRM integration can make it much easier and much faster to transfer information into the CRM system. If using a third party tool is an option for your Company, this document provides pointers to the types of features that will best help meet your particular business requirements.

## Ready-to-go Connectors

CRM Integration tools already have connectors in place for your particular CRM system, which can have many benefits. For one thing, they incorporate extensive amounts of code and experience to make it easy to maintain the CRM system's business rules. For instance, if you create an account in some CRM systems, you also have to create a corresponding address (even if it's empty), otherwise the user interface "breaks" – this is the sort of thing a connector manages automatically.

Connectors also make it straightforward to know where incoming information should be placed in the CRM environment. They will often mask complex data schemas with a more straightforward layout, making the process of mapping much easier. This not only saves a lot of time, it also helps protect the integrity of your business data.

## Built-in Data Management

CRM Integration systems can also include data management tools to ensure that data coming in conforms to the data format required by the CRM system. The amount of data manipulation functionality across integration tools varies, and is a big differentiator between them.

Some data transformation is simple, such as taking one date format and translating to another. Most tools will have libraries of functions that deal with this sort of transformation automatically. Things can, however, be more complicated.

Names, for instance, may come in as one field, such as *Fred Smith*, and need to split out into two fields, one for the first name and another for the last name. To make it more complicated, the incoming value could be *Fred Smith*, *Mr. Fred Smith*, *Mr Fred R Smith* or *Mr Fred R Smith Jr.* – you get the idea. Some integration tools have functions to handle more complex examples such as this.

Then, there are really complicated data transformations. Take as an example a company name *ACME*, which might come in as *acme*, *ACME Inc*, *ACME*, or even have misspellings such as *AMCE Incorporated*, *AMCE*, *aMCE*, and so on. A few integration engines can also handle this sort of challenge by providing preset rules that the user can tweak to improve matches; they may even provide "fuzzy matching" capabilities with tolerance levels for different match qualities so that little or no manual intervention is required.

## Strong Matching Tools

Another area purpose designed integration tools can assist with is matching. This is important for catching duplicates, as well as for making sure that details are attached to the correct records. Basic integration tools use an integrated query language such as SQL for matching. More advanced products provide additional options to deliver a range of cost and performance benefits, and are critical for widening the breadth of data that can be reliably transferred. Strong matching is probably the biggest differentiator across different CRM integration tools

## And There's More.....

Other things to look out for include:

- the ability store and reuse transfer jobs
- tools to link procedures to other events, or be triggered by other processes
- easy ways to safely test and refine transfer runs
- the capability to manage high volumes
- strong audit and logging
- the ability to send data both to and from the CRM system.

## What's the Best Integration Solution?

In some instances a simple integration tool will suffice. There are many component based tools that operate with a click and drop approach and if the data transfer is totally straightforward – and sometimes it is – these will do the trick. Bear in mind, however, that your processes will need to match the capabilities of these tools – they will not easily bend to accommodate any non-standard business flow requirements.

For more complex needs, in terms of data and/or business processes, a robust application with breadth and depth of functionality will serve you better. Returning to the example of lead distribution introduced earlier, to improve the lead routing you would probably need to consider at least the following:

- some data cleaning on incoming leads
- the rejection of duplicate leads
- data transformation
- routing according to user defined business rules for sales territories, teams and personnel
- the ability to define and implement complex business rules
- a simple way to maintain and update these rules
- rapid, repeatable lead transfer
- an easy and safe testing approach
- comprehensive audit trails to track logged leads

Requirements such as these these will be difficult to meet with a simple approach, and require the use of more powerful solutions, and the support of highly experienced personnel.

## Conclusion

It's clear that a tool designed to manage the potential complexities of data transfer will ultimately save a huge amount of time and money, as well as protect the integrity of your valuable information. Still, at the end of the day, you'll have to do your homework: Understand your data flow and how this relates to business operations, know your data quality and structure, be realistic about what is feasible with your deadlines and budget, and try to fix as many costs as possible in advance. Only then will you be in a position to evaluate the best data integration solution to leverage your CRM investment.