

CMS Integration

Executive Summary

Managing the flow of information and making sure key decision makers have the most up-to-date information is a common challenge many businesses face. Too often, information “silos” get formed among different units within an organization, preventing them from efficiently working together and sharing information.

Different departments within an organization may even use different technologies that are not integrated or not talking to each other. This inevitably leads to mistakes, lost money and time since one department may not have the most current information available to them.

For example, your marketing department may be using Salesforce.com while the accounts division may use SharePoint, resulting in inefficient and duplicative processes, increased costs and the inability to generate information quickly.

While many companies simply live with the consequences of mediocre customer relationship management practices, others try and attempt to solve this problem manually or they resort to highly customized CRM solutions that are not easy to maintain and lack many important features.

Many CRM solutions are available to help companies like yours manage everything from sales and marketing to accounting and inventory management

In the following pages, we will outline two programs companies commonly use as well as explain how integrating them together can go a long toward ensuring seamless information sharing and customer management across all departments. Companies both large and small use business process integration solutions like these to manage and grow their businesses.

Each of the following options includes SharePoint as its intranet collaboration utility. Many businesses use this popular Microsoft product to collaborate, share files as well as provide a framework for web application development.

However, SharePoint cannot provide all of the functionality a business needs to operate efficiently. Therefore, companies will use other CRM utilities to fully round out their IT needs. However, if these utilities do not talk to each other and share information, businesses will find difficulty in effectively managing their operations.

Programs like these must integrate seamlessly so all members of your organization can collaborate and share information easily

Continue reading to learn more about Salesforce.com CRM integration with SharePoint and Microsoft Dynamics CRM integration with SharePoint, two popular options companies use. See how these options help companies large and small effectively manage and grow their businesses.

We'll also give you a fictional situation of a company who attempts to manage all of this themselves and detail the ensuing chaos.

What is Business Process Integration and Why Is It Important?

Integrating disparate business systems to talk with one another is a vital step in effectively managing your company's information flow. To be more specific, business process integration gives you the

"...ability to integrate the diverse data and information sources both within and outside your enterprise into a single coherent framework"

This integrated, seamless network can then be shared by multiple applications critical to accomplishing your business' objectives.

In a basic technical sense, business process integration is in fact a read/write capability between disparate programs. If your sales team makes a change to some figures, your accounting department will be able to see them in real time and vice versa.

BPI acts to link projects together so everyone is on the same page.

Not integrating software programs like SharePoint with Salesforce or SharePoint with Microsoft Dynamics CRM will mean countless delays in making sure information is up-to-date. Company staff will have to divert attention from their main duties to update content – a monumental task that can easily spin out of control.

And not only will this monstrous task prove daunting for many, the two data 'silo' situation that exists in non-integrated systems will produce duplicate and misaligned data. Not only does this add expense to your operations, it can lead to decisions based on old information.

The following quote from the Gartner Group is quite revealing in what companies could miss out on by not integrating these disparate systems.

"Businesses that connect the design of information and business processes with technology will exceed average sector performance by at least 15% by 2011"

Therein lies the goal of BPI and that is to create a process models and definitions as managed entities so users can easily view, modify and comment on changes in a business environment. It enables managers to track key performance indicators in real time and gives them the right information to make critical decisions.

Getting Disparate Systems to Work Together

One of the purposes of this paper is to briefly describe different programs that when separate, create the information 'silos' that can prove so devastating to your business' bottom line. Chances are, you're using one of these combinations.

SharePoint is a Microsoft intranet program many companies use to accomplish a variety of goals. Integrated with various productivity tools like Microsoft Word and other Office products, the system allows workers to easily collaborate on projects.

Specifically, the SharePoint platform provides:

1. A central location to store and manage documents
2. Customized document control
3. Collaboration ability for employees
4. Simplified web content management capabilities

Through these attributes and others like easy scalability, SharePoint helps improve organizational effectiveness by helping your company satisfy two key objectives – collateral production and management and analyses and reporting.

While SharePoint consists of an integrated suite of server capabilities, it doesn't provide all of the functionality required to effectively manage an entire business. For instance, your marketing and sales departments probably use other programs to interact externally with customers and prospects.

Salesforce.com and Microsoft CRM (a.k.a. Microsoft Dynamics) are a couple of programs commonly used for these purposes.

Salesforce.com

More than 70,000 organizations worldwide use Salesforce.com to manage dealings with prospective and current customers. This cloud-based CRM platform meets two core functions:

1. Sales and service collateral delivery
2. Sales and service activity collection

Salesforce's cloud infrastructure consisting of Sales, Service and Collaboration clouds – along with the Force.com platform – provides a powerful, functional tool to sales and marketing teams in a wide variety of businesses.

Companies large and small use the Salesforce CRM platform to collaborate with and track customers in an effort to keep sales moving along seamlessly.

That's the plan anyway. If Salesforce isn't integrated with the SharePoint platform, the sales team or the accounting division could base decisions on erroneous information.

Take this scenario as an example:

XYZ Enterprises is planning a major marketing campaign. They reach into their Salesforce files to generate a list of potential customers to mail solicitation materials to. But since their system isn't integrated with SharePoint – which is what XYZ's accounting division uses – the marketing team winds up sending the materials to many who are already customers.

As you can see from this example, if the two systems were talking with each other, the marketing team would have known some of the people on their list are already customers. Instead, existing customers will receive materials designed to entice new customers to do business with XYZ Enterprises. One, this is wasted effort and two, it makes XYZ's marketing department look inept and disorganized.

Microsoft Dynamics CRM

Another common CRM tool companies use is Microsoft Dynamics. Like Salesforce, it helps marketing, sales and customer service departments develop and maintain relationships with both prospective and current customers.

Used by over 300,000 businesses, Microsoft Dynamics works within the same platform(s) as SharePoint, which is also a Microsoft product.

Microsoft Dynamics CRM is designed to easily integrate with Microsoft's .NET framework, which is what SharePoint runs on as well.

However, Microsoft Dynamics and SharePoint don't automatically integrate together because they're made by the same company. Each system is designed for different aspects of a company's operations. Nevertheless, it's vital these two disparate systems talk to one another in order to avoid situations like the one outlined above in the Salesforce section.

How Do We Integrate These Disparate Systems?

If you have Microsoft SharePoint and Salesforce.com or SharePoint and Microsoft Dynamics, you will want to be sure they are properly integrated. By integration, we mean they have read/write capability between each other.

Can a document created in Salesforce be read and edited in SharePoint and vice versa?

Business process integration solutions are available to help companies get the most from their IT investments.

Sometimes though, companies try and attempt to integrate these disparate systems themselves without the help of an outside IT consulting firm like Innovative Architects.

In short order though, they find this process to be very expensive and a diversion from other internal tasks. For instance, your internal IT personnel may let other regular tasks slip. Integrating these systems yourself can lead to chaos and requires tons of code to be written.

Considering time is money, no-code solutions from BPI consultants at Innovative Architects can link systems like these together easily and quickly.

Therefore, your internal IT personnel can focus on their primary responsibilities of ensuring systems work for company workers, managers and executives.