Expert IT Solutions Newsletter

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Welcome to our third newsletter for the year - this time we look at cloud services integration and CRM services / applications.

Cloud Integration Services

The concept of integrating software applications to gain synergy effects has been around for decades. The benefits can be very useful, imagine having information about customers in one database or application and transactions in another application; by integrating them you can see a comprehensive view of the entire relationship.

In the days when applications where only on premises integration was very difficult, taking expertise and a lot of money depending on the interfaces of each application.

The rise of public cloud services has changed all this considerably. Today many, if not most, Software as a Service applications that businesses can subscribe to from the cloud come with integration capabilities. These are called APIs (**A**pplication **P**rogramming **I**nterfaces) which is like a language definition for how the service can be "talked to" and asked to do tasks. Some cloud services even rely on these integrations, simply focusing on one task or area and leaving other, related tasks to cloud services that are experts in those areas.

There's another type of cloud service that has arisen to meet this challenge: integration services. These cloud services are used to link different services together with either time based actions (i.e. once a day do **this**) or event driven actions (when this happens **here**, do this **there**). A simple example is a person filling in a contact form on your company's website, which triggers the integration service to initiate a welcome email being sent from another service, as well as a record of the person's contact details being created in your Customer Relationship Management system. Another example is a backup of a database is one system being performed every night and then stored in another system, somewhere else. These services can even reach into applications that are running on your server in-house and initiate actions there.

Examples of cloud based integration services include If This Then That which is focused on consumer scenarios, while ITDuzzit and Zapier are examples of business services. After a couple of recent projects we see the great value in these services so if your business is using cloud services today and you're wondering if integrating them would increase their benefit to your business please contact us and we'll be happy to help.

Customer Relationship Management (CRM)

This type of software application has been around for a LONG time, with pioneers from the mid 1980's such as ACT and Goldmine (the former is still currently available). Today the poster child for cloud services (the Software as a Service, SaaS kind) is Salesforce which offers both a comprehensive (and pricey) CRM system as well as a platform for developing custom solutions (force.com).

The point of CRM is to have a single location for storing ALL information about your customers / clients and their interactions (including goods or services purchased) with your company. CRM systems should also be able to handle leads; people or companies who may become customers in the future. Today CRM is often abbreviated xRM to indicate that it's not just about Customers or Clients, it's about everyone that your business interacts with. Imagine having a single interface that everyone in your business could use which contained all the information about a contact or a company. Not just your sales staff but everyone would be able to relate to a client on the phone or via email in a more professional way as well as be more efficient in managing requests. Modern systems even integrate with social media such as Twitter, Facebook and LinkedIn to show details about people and businesses in those networks, while also tracking your company's image on these social sites.

There are many CRM systems on the market today, some on-premises, some cloud based and some that offer both installation types. All modern CRM systems also offer mobile clients so that the days of staff on the road having to take notes and then enter them into the right place when they're back in the office are no longer applicable. The key to success with any CRM system however isn't in the technical features but rather in two important aspects; the first is the quality of the data that you enter into it. If you have some form of contact database today and it's out of date or contains a lot of contacts that should not be in your new system, some data hygiene is required before import. We have recently been involved in exactly this kind of clean-up / data massaging project.

The second aspect is customisation, the only way a CRM system is going to be a real productivity booster for your staff is if it truly helps them manage contacts and customer interactions by displaying the right information in an easy way. Again, we've recently been involved in a CRM selection and implementation / customisation project so if you think that a CRM system or changing your existing system might benefit your business, please contact us.

If you have any questions or suggestions for topics you'd like covered in this newsletter, please email us.

Next time we'll look at Windows 10 which should be available from the end of July as well as 3D printing and the future it promises.

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