

# Taking On Demand CRM Integration to the Next Level

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**ORACLE**  
CRM ON DEMAND

# Taking On Demand CRM Integration to the Next Level

## **EXECUTIVE OVERVIEW**

During the past few years, the growth of on demand, or Software as a Service (SaaS), CRM solutions has significantly accelerated, fueled by adoption among organizations of all types and sizes seeking ways to quickly and cost-effectively deploy CRM to meet specific line-of-business goals. Lower initial and ongoing costs, faster time to market, and less reliance on technical expertise are just a few of the drivers behind the acceptance of on demand as a viable CRM deployment option. Now these advantages are attracting the attention of larger enterprises. However, the difficulty in integrating complex business processes that span across countless applications typically found in larger organizations continues to be a frequently cited concern and barrier to acceptance of the on demand model.

Companies invest in best-of-breed solutions, whether on demand or on premise, to optimize best practices within each application's domain. The challenge is in integrating these solutions. Enterprises may want to integrate an on demand CRM application with an on premise ERP system to gain greater agility and user adoption within sales teams while also leveraging existing systems for order fulfillment and accounting. Or there may be a need to integrate a department's on demand CRM solution with an established on premise CRM system in use elsewhere within the organization. Unfortunately, these applications typically operate as silos, disconnected from the actions of the other. Therefore, linking them to achieve an end-to-end business process has been a difficult-to-attain goal.

For an enterprise to fully leverage its investments in various domain applications such as CRM, order management, and supply chain management, it must ensure comprehensive integration across data, user interface (UI), and business process levels – transforming a portfolio of disparate applications into a unified, virtual application suite. Only then will users be able to complete a business transaction from a single application UI and interact with the latest information, regardless of where the data is stored or how it is synchronized. Without a complete integration, the user experience will remain disjointed, unsatisfying, and inefficient.

This white paper discusses current integration challenges facing businesses with mixed deployments and presents Oracle's vision and solution for comprehensive integration with Oracle CRM On Demand.

## **TODAY'S INTEGRATION CHALLENGES**

More organizations are considering the on demand model as a viable deployment option for CRM – increased flexibility, rapid implementation, and reduced costs allow businesses with limited resources and time to quickly realize business gains. Larger organizations in particular are considering on demand applications for the flexibility a subscription-based offering provides to internal lines of business. For example, an organization may want telesales representatives to have an on demand solution for automating sales processes and centralizing lead, opportunity, and account information while customer service representatives have access to an on premise CRM solution with highly robust inbound and outbound call center capabilities.

The true potential of any new application investment – be it on demand or on premise, front or back office – is realized when information readily flows across applications to support a streamlined business process. The problem is that applications often operate within silos, inhibiting collaboration and coordination across repositories of information and reducing sales, marketing, and service effectiveness. For example, attempts to integrate an on demand CRM solution with a well established on premise CRM system risks fragmenting key customer data and undermining the effectiveness of these systems. Or, efforts to introduce a new on demand CRM solution to support the roll out of a new sales force, while at the same time relying on an existing on premise ERP system for order fulfillment and accounting, could have potentially disastrous consequences with customer orders and invoices. To accommodate for these shortcomings, organizations endure sub-optimal processes that conform to integration restrictions rather than streamlining practices that increase business productivity and sales efficiency.

The result is a disjointed user experience, increased administrative burdens on sales representatives, and ultimately, reduced sales effectiveness. Because data stored in one system is not synchronized or shared with another, organizations risk having outdated or even inaccurate information displayed to sales users. When information is not readily available through a single application, salespeople are forced to toggle between applications to access and interact with relevant data such as leads, quotes, product information, and service requests. As a result, sales representatives are forced to spend time out of their busy day reconciling information and manually re-entering data in other applications to make up for the functional disparity, increasing the chance for inaccurate and redundant customer information to be incorporated within an organization's information systems. Furthermore, this administrative overhead reduces the time salespeople have available to spend with prospects and customers, affecting overall sales productivity.

What organizations need is a virtual suite of applications that behave and interoperate as a single entity.

## Why Is Integration So Hard?

As the adoption of on demand solutions continues to grow, hybrid combinations of on demand and on premise installations within an enterprise will become more common. These instances run the risk of becoming isolated application silos without the means to easily and effectively link to the wider application network. Integration attempts are complicated by the following factors:

- **Increase in environment complexity.** Different business units and geographies of an enterprise can have different systems, and these systems can be a mix of custom, packaged, on premise, and on demand. Consequently, customer information is often fragmented across various repositories and difficult to incorporate into a single view.
- **Different vendors, different architectures.** With multiple systems often comes varying architectures from multiple vendors. Proprietary data models, standards, and interfaces may be used, making integration across these unrelated applications even more difficult. Integration of multiple proprietary platforms is further complicated by divergent roadmaps and uncoordinated release cycles.
- **Expensive do-it-yourself integrations.** As a result of the lack of standards-based architectures and prebuilt integrations, organizations are forced to undertake the costly process of building custom integrations that are not easily adaptable, extendable, or upgradeable.
- **Insufficient integration depth.** Most integration efforts are often limited to the data level as more sophisticated UI and business process integration efforts prove to be more challenging. However, only through a holistic integration approach at the data, UI, and business process levels can organizations reap the true potential and return on investment of connecting best-of-breed applications. A user experience cannot be seamless if a user needs to toggle between applications and re-enter information that was already captured in another system. For example, re-entering account information on an order stored in the back office when that information is already captured in the front office is a time-consuming and error-prone exercise for the user.

Organizations already struggling with the challenge of linking together disparate applications face extra complexity with the addition of on demand deployments. Companies find they cannot adjust to new business requirements easily and cost effectively. Users experience difficulty completing a single business transaction, often because such activities require needless toggling between various applications, and thus additional user training. Most importantly, users do not have access to the complete set of information they need to do their jobs. For example, without the ability to easily view past orders stored in a back office system while working on an opportunity in a CRM application, a sales representative may miss invaluable up-sell or cross-sell opportunities. Users cannot tap into the true potential of CRM without the ability to share and communicate information seamlessly with other applications.

## RESOLVING THE INTEGRATION DILEMMA

The lack of a robust standards-based architecture, an incomplete integration strategy, and lack of prebuilt integration make such efforts costly, time-consuming, and unsustainable. To remedy this requires an integration approach that leverages an open, standards-based platform for extending, managing, and modifying end-to-end business processes across packaged and custom applications. The strategy for integration needs to be comprehensive, to ensure seamless coordination across the data, user interface, and business process tiers and deliver a virtual application suite. And finally, prebuilt, sustainable integrations between common industry applications are needed to accelerate the time to achieve business value, facilitate integration efforts, and reduce costs with minimal risk.

**“Mixed environments of on-premise, on-demand, and hosted application management will remain the norm...Integration through open standards such as SOA will be key in ensuring ease of interoperability.”**

**—Mary Wardley,  
IDC<sup>1</sup>**

### Standards-Based Foundation for Integration

Companies have made wide ranging investments in their existing application infrastructure and want to preserve these assets while maximizing return on investment. Leveraging industry standards such as Business Process Execution Language (BPEL) and Web services meets this goal by providing a common framework for applications to communicate and coordinate activities across a business process. BPEL enables organizations to not only quickly assemble a set of discrete services into an end-to-end process flow but also to rapidly modify processes as business conditions change.

Oracle takes such an approach to integration by leveraging its Application Integration Architecture (AIA), an open, standards-based platform for managing business processes across Oracle and other packaged and custom applications. AIA leverages open standards and a Service Oriented Architecture (SOA) to deliver industry best practices and operational governance capabilities to help organizations build integrated industry processes, regardless of the applications involved. Using AIA as a framework, organizations can link Oracle CRM On Demand with market leading applications, leveraging a best-in-class technology foundation and industry leading best practices. Built using Oracle Fusion Middleware and BPEL, and based on a common data model, these processes are extensible, repeatable, and sustainable.

**Integration across the data, user interface, and business process layers is key to enabling a seamless user experience spanning across applications.**

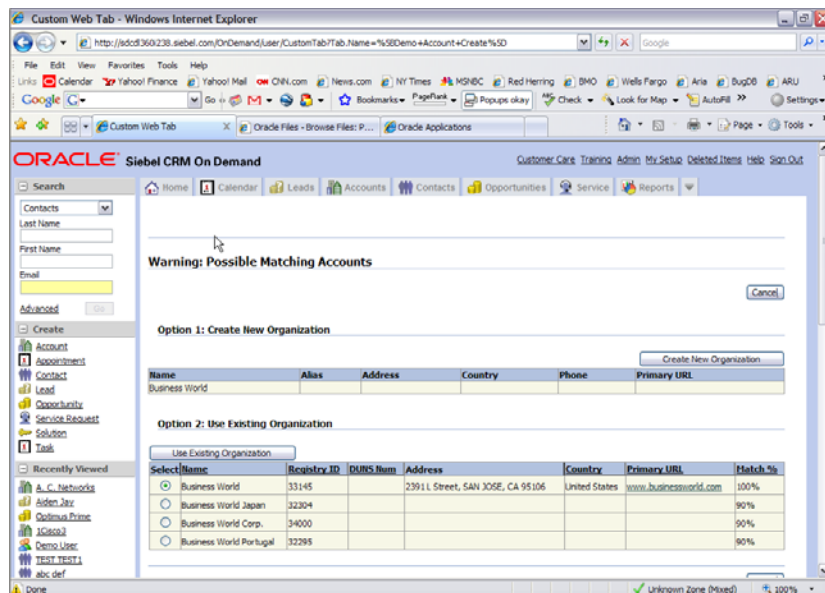
### The Three Tiers of Integration for a Virtual Application Suite

Organizations want their array of applications to behave as a unified application suite. To achieve this goal requires the ability to fully integrate applications across data, user interface, and business process layers. To integrate at just one of these tiers is limiting – a seamless integration requires a combination of all three.

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<sup>1</sup> “Worldwide CRM Applications 2006 Vendor Shares: Marketing, Sales, and Customer Service,” Mary Wardley, IDC, June 2007

- Data.** The most basic form of integration involves the data layer via Web services, batch integration, and data import and export. More critical information, such as customer and product data, needs to be appropriately synchronized in real-time or accessed regardless of where the data originally resides to ensure that users can access the latest information from any source without fear of duplication. It is critical to have real-time flow for data such as accounts, contacts and products, where information frequently changes. For instance, customer orders can be delayed or even lost if account shipping information in CRM and ERP systems are not kept up-to-date, severely impacting customer satisfaction.
- User Interface.** A more highly developed integration involves the user interface layer where advanced integration extensions enable usability features like mashups and web links to embed custom HTML and third party content within the Oracle CRM On Demand user interface. As a result, users can view information from other applications within a single user interface, vastly improving usability and user productivity. Users can interact with content through one application rather than needing to navigate across multiple applications. Because users can access back office information – such as products and quotes – from the front office application, less time needs to be spent training salespeople on multiple applications. And sales users have more information available at the point of interaction with their customers, enabling a better service experience.



**Figure 1: The Oracle CRM On Demand Process Integration Pack for Oracle E-Business Suite includes comprehensive data quality management, eliminating inconsistent and redundant data among front and back office applications.**

- Business Processes.** The highest level of integration involves business processes that span across applications. In addition to business process orchestration, business logic, such as data validation rules, need coordination as well to ensure consistency throughout the entire process. Business processes based on BPEL are the key enabler for adopting a Service Oriented Architecture (SOA), enabling steps in a business process to be stitched together across applications to form a complete, end-to-end flow. By leveraging business process integration, organizations can build processes around the customer that span application boundaries rather than conforming to integration constraints. With business process integration, a complete business flow such as lead conversion can reconcile account information from a lead in a CRM application with similar information in an ERP system, eliminate redundant and duplicate data, and automatically convert the lead to an opportunity. Rather than change the application when business needs change – which can be a lengthy process – organizations can simply alter the business process in real time to adjust to changing dynamics.

By effectively mixing and matching these integration tiers, organizations can move beyond just managing application data. Customers can reach a desired business outcome, which minimizes duplication of data, leverages information wherever it is stored, and provides a seamless user experience with no need for the user to be aware of application boundaries. A complete view of the customer, regardless of how the data is stored or dispersed across the enterprise, arms salespeople with the critical information they need – such as quotes, orders, and invoices – via a single point of interaction.

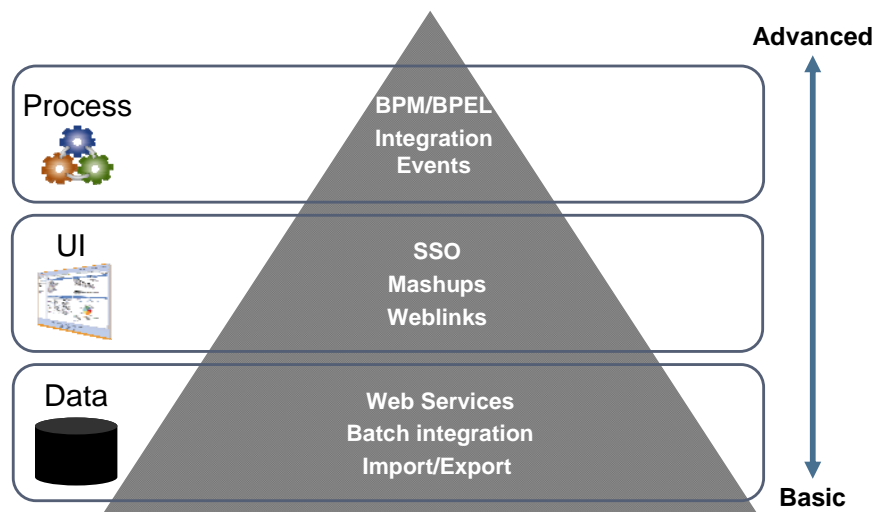


Figure 2: Oracle provides prebuilt integrations at the data, user interface and business

**process levels – ensuring data quality, maximum user adoption, and highly effective cross-application business process flows.**

**Because Process Integration Packs leverage Oracle Fusion Middleware, organizations can easily extend these integration solutions to meet their unique requirements.**

## **Process Integration Packs**

Prebuilt integration packs address the key pain point with custom integrations – pay a lot up front to build the integration and a lot later on to maintain and upgrade. These prebuilt Process Integration Packs, built using the same standards-based interfaces available for custom integrations, allow organizations to fully leverage investments made in various systems more quickly and cost-effectively. Each Process Integration Pack leverages Oracle’s Application Integration Architecture and uses a methodology that enables rapid implementation. Process Integration Packs provide the business logic, BPEL process flows, Web services, and business rules to connect applications in a seamless flow. By fully integrating at the data, user interface, and business process levels, these integration packs offer an accurate view of customer and product data across the front and back office. Process Integration Packs offer prebuilt integrations and ongoing support and enhancements for these integrations, reducing the time, complexity, and cost of implementing and deploying industry best practice processes that connect and optimize business operations.

### **A Blueprint for Integration**

One of the benefits of the Process Integration Packs is they provide a blueprint or template for integration, enabling organizations to duplicate the capabilities of an integration pack for other applications. If an organization is not using a particular Oracle product and would prefer to instead integrate with a custom or third party application, that option is available. For example, if an organization chooses to use a custom quoting application rather than the quoting module in Oracle E-Business Suite to build an opportunity-to-quote business flow, the integration pack can be used as a template to swap the custom application in its place. The ability to use these integration packs as a model enables organizations to adapt to specific scenarios in a business process.

**“The integration between Oracle CRM On Demand and Oracle E-Business Suite offered out-of-the-box by Oracle enables us to easily access and update back office information and achieve a 360 degree customer view.”**

**—Dominic Martinelli,  
VP of IT, Rackable Systems.**

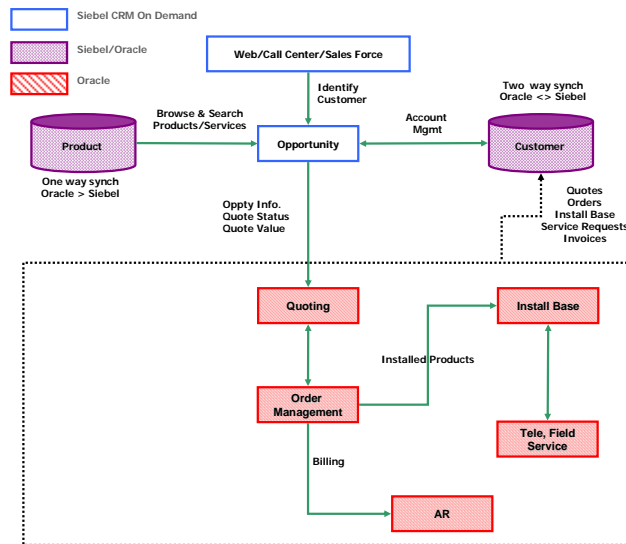
### **Prebuilt Oracle E-Business Suite Integration Pack**

The Oracle CRM On Demand Process Integration Pack for Oracle E-Business Suite combines key business processes between Oracle’s on demand CRM solution and Oracle’s leading ERP solution. From a business process perspective, the integration pack streamlines the Opportunity-to-Quote process and supports the auto-conversion of leads to opportunities and opportunity information captured in Oracle CRM On Demand to a quote in Oracle E-Business Suite. At the user interface level, sales representatives can easily view back office data within the context and look and feel of the Oracle CRM On Demand application. Finally, from the data perspective, users interact with the most up-to-date information, through real-time synchronization of key information like customer and product information. Integration with Oracle Data Quality Management ensures data is

appropriately validated to eliminate redundant information and that all systems have consistent data.

While some information, such as product and customer information, is synchronized between the two systems, other information, such as quotes, orders, delinquent receivables, and debit/credit items from Oracle E-Business Suite, can simply be leveraged from its source and displayed in Oracle CRM On Demand; thus, data can reside in Oracle CRM On Demand, in Oracle E-Business Suite, or shared between the two.

As a result of this integration combination, users can complete a lead-to-cash business flow and interact with both front and back office information – all within the context and look and feel of the Oracle CRM On Demand application.



**Figure 3: The Oracle CRM On Demand Process Integration Pack for Oracle E-Business Suite shares and leverages data across systems to provide a seamless user experience when interacting with customer information.**

### Direct Integrations

In addition to Process Integration Packs, Oracle also offers prebuilt direct integrations to manage data flows between systems. These prebuilt direct integrations offer organizations the benefits of an AIA solution built on open standards to reduce costs, minimize risk, and speed time to market. The Oracle CRM On Demand Integration to Siebel CRM provides a single customer view across on premise and on demand deployments by synchronizing data between Oracle’s Siebel CRM and multiple instances of Oracle CRM On Demand.

## THE ORACLE ADVANTAGE

As the world's leading enterprise software provider, Oracle understands the requirements and challenges facing organizations looking to maximize value with existing software investments, as well as the challenges they face in integrating their applications.

Organizations expect their applications to interoperate as a virtual suite, regardless of whether the applications are provided by Oracle, another packaged vendor, or are custom-built. Oracle delivers on this expectation by providing an integration strategy that is standards-based, leveraging the Application Integration Architecture framework and Process Integration Packs to expedite integrations. True interoperability requires complete integration of these applications at the data, user interface, and business process tiers.

Furthermore, as the sole CRM solution provider that owns the entire technology stack, – from database and middleware to application user interface to hosting services – only Oracle offers a single vendor advantage in providing a seamless integration experience across Oracle CRM On Demand and the world's leading applications:

- **Commitment to standards.** Built on the open, standards-based Application Integration Architecture foundation for managing business processes across applications, Oracle's integration solutions ensure extensibility, upgradeability and sustainability.
- **Full responsibility for product quality, service, and support.** Oracle's dedication as a sole vendor ensures single point of contact for the Process Integration Packs and integrations across its portfolio of applications.
- **Products built to work together.** As the leading provider of software applications, Oracle ensures compatibility among its existing solutions and next generation Fusion applications, with a common development platform and synchronized releases.
- **Long-term vision and unified roadmap.** With more than 5,000 CRM customers and 5.6 million 'live' users, Oracle is dedicated to the long-term sustainability of its products to ensure customers can continue to leverage, extend, and evolve their applications. Oracle's unified roadmap ensures applications deployed today will evolve with the broader product suite and provides the option of choosing different deployment options as an organization's requirements change.

To learn more, please visit [crmondemand.oracle.com](http://crmondemand.oracle.com).



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