



SUPERCHARGING SOFTWARE A WORKBOOK SERIES FOR TECHNOLOGY LEADERS

The Integration Process



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WORKBOOK SERIES

Getting the most from your technology is more than checking boxes off a list. It's about getting a real understanding about what you need. It's not just about what the software can do; it's about what it can do for you.

There are different points throughout the software process where companies get stuck. Software is not a one-size-fits-all solution, so to get the most from your software, you need to take a deep dive into your use case. So, how do you do that?

At Faye, we eat software. We eat the complexity and are shooting out a series of questions for you to answer to truly unlock your software's full potential.

This Supercharging Software Workbook Series walks you through the questions you need to answer at each stage of software: selection, implementation, integration, adoption, and optimization.

It's a roadmap for you to break through some of the sticking points most common during the software process. You may only need one of these workbooks, or maybe all five. Regardless, don't get tied down, cut through the complexity.

Time to jump in to Step 3: Integration.

INTEGRATION PROCESS

There are a lot of software solutions in the market. You easily have a handful of them that you use every day. Email, calendar/meetings, marketing automation, accounting, TMS, CRM, ERP, business intelligence, project management, and virtual assistants are just some of the types of technology you may be using.

When you can connect these solutions, you can create efficiencies for you and your team.

Answering the below questions well help you determine what to integrate and/or the best process for you to do it.

INTEGRATION QUESTIONS:

Questions to answer before you start the integration process:

1. What are your short term/long term goals for integrating your software? Do you have different phases, like what do you absolutely need integrated and then what you want it to do eventually?

2. What existing or aspiration software do you want to integrate? Email, Calendar/Meetings, Marketing Automation, Accounting, TMS, CRM, Business Intelligence, Communication, Project Management, ERP, Virtual Assistants, etc.

3. What data do you need to integrate? In the above software platforms, what do you absolutely need integrated? Ex. Billing addresses, sales orders, etc.

4. Where is your current solution lagging? What do you need this integration to solve?

5. Do you want your data to be unidirectional or bidirectional? If you choose one way, which way do you want it to go? Do you want only basic information to transfer back and forth?

6. How often do you need to sync your integrated software? Is it in real-time or once a day/week?

7. What's the volume of data? How much data do you expect to be passed between software?

8. Do you have a preferred technology for integration? Do you have a middleware solution already you want to continue to use? Is there a more updated solution to use instead?

9. How will conflicting data be managed during integration? What's your source of truth?

10. What is your timeline for the integration?

11. What is the budget? Does your desired timeline and data you want to integrate work within your budget?

- 12.** If you have data in two places, where are your users getting the information? What teams use which systems? What information do they actually need?

- 13.** How does this integration save time/create efficiency for users?

- 14.** Have you considered the potential “risks” of integration? Cybersecurity, compliance, customer experience best practices.

NEXT STEPS

Integrating your software solutions will help you streamline your business processes and reduce data input time for your team. Now that you've figured out integration, check out the next step of the Supercharging Software Workbook Series: Adoption.

Go to www.fayedigital.com for more education.



At Faye, we love software. We eat it, breathe it, and build it. Our mission is to make the best software in the world even better by helping clients lead the way with software strategy, deployments, integrations and technical support.

With us is better than without us. As an Inc. 5000 award winner 7 years in a row, we help mid-market and enterprise clients globally achieve up to 10x productivity returns by leveraging the hidden potential within Zendesk, SugarCRM, Salesforce, HubSpot, and more.

There is no ceiling to what we can achieve with a lot of caffeine and an uncompromising commitment to make software better. We are intensely passionate about eating your software complexity and challenges, so that you don't have to.

Our flagship offering, AXIA by Faye™ bundles our IP, capabilities and pre-built software enhancements into one monthly or annual subscription. The result—A partnership that drives lasting value and optimization even as you grow.

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