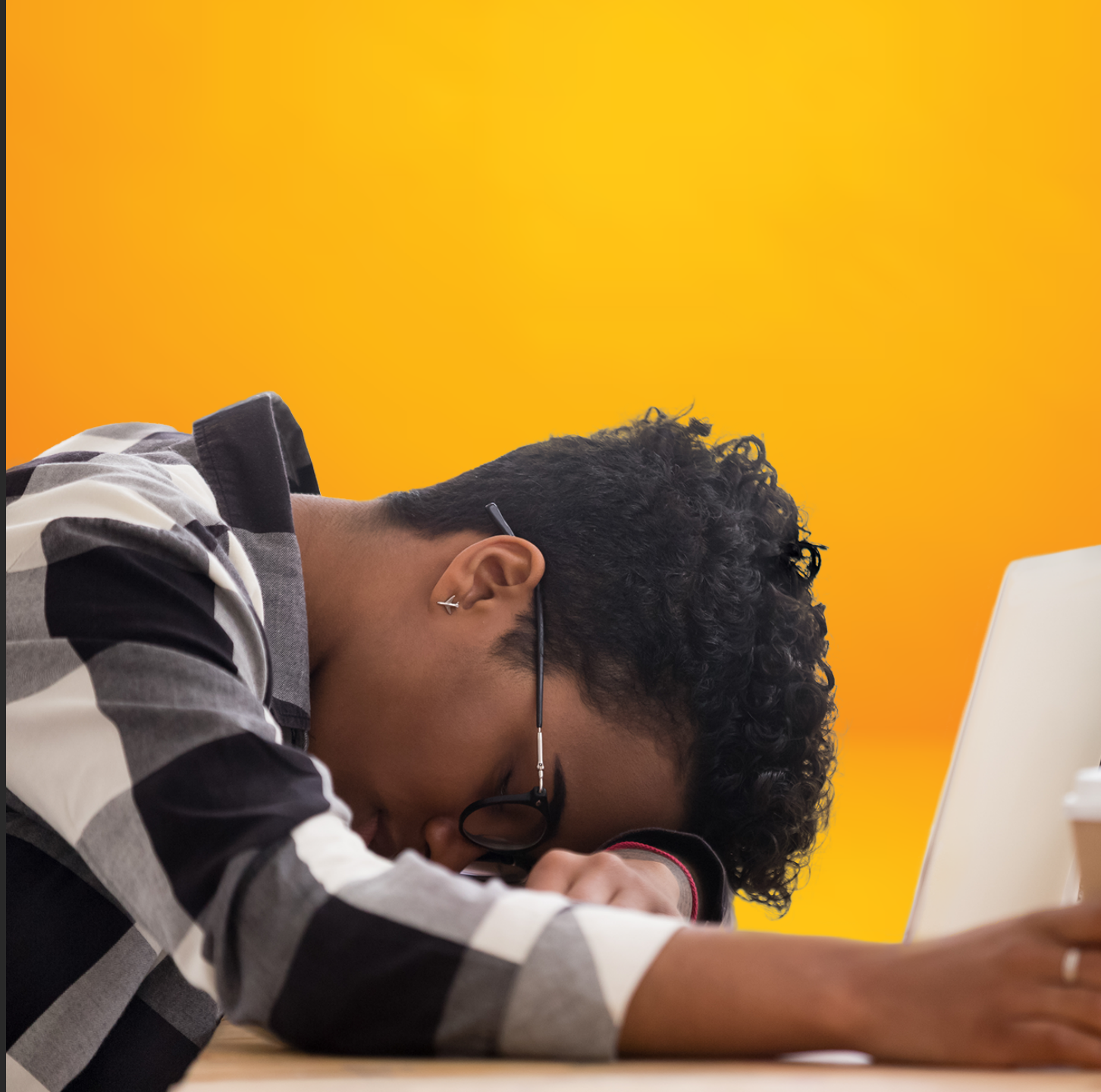TRUJAY

INTEGRATION HARD TRUTHS

USING 'OUT OF THE BOX' SOLUTIONS

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Thinking of using an 'out of the box' CRM integration tool?

INTRODUCTION

Connecting a system or platform to your CRM has many benefits. Billing is streamlined by integrating an accounting system. Sales opportunities are monitored centrally by using a system like Pipedrive. Platforms like NetSuite allow you to connect multiple enterprise-systems to accelerate your business operations.

While the benefits of connecting new systems to your CRM are clear, trying it yourself isn't always the best option. There are several parts of the process to consider, such as planning, support, maintenance, time and cost.

Many people choose 'off-the-shelf' systems for their integration needs or use 'native' integration solutions provided through their CRM. These may be the most convenient options, but they may not always satisfy your custom requirements.

We understand you might still want to tackle connecting systems on your own, so we have created a reference to help you plan for your upcoming integration.

Thinking of using an 'out of the box' CRM integration tool?

1 ARE YOU A CRM INTEGRATION EXPERT?

You're not an expert in CRM integration, so how long do you think it's going to take?

You could spend hours, days or even weeks trying to connect your CRM with other platforms.

Unless you have successfully completed CRM integrations before, this could be a time-intensive exercise.

IF YOU ARE GOING TO DO IT YOURSELF…

1. Plan on the integration taking 2 - 3 times longer than you think

2. Do as much research as possible on your out-of-the-box solution to ensure it meets all your needs and has adequate support

3. Ensure you have a technical support option if you run into any trouble

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2 YOUR TIME IS TOO VALUABLE

You may spend hours or days on your CRM integration - time you're not spending on your business.

You could spend hours, days or even weeks trying to connect your CRM with other platforms.

Can you really afford this additional time, especially when you could be working on growing your business?

IF YOU ARE GOING TO DO IT YOURSELF...

1. Complete your integration activities after business hours to reduce impacts on normal business activities

2. Backup all data and records in case the integration causes data loss

3. Ensure you have a technical support option if you run into any trouble

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3 ARE YOU GETTING WHAT YOU NEED?

Can the 'out-of-the-box' solution do 100% of what you need? What if your requirements change?

Most 'out-of-the-box' or 'off-the-shelf' CRM integration solutions have a limited set of capabilities and rarely offer customized options.

You also have to consider if your solution will support you through any CRM changes or if you want to connect other (non-supported) platforms.

IF YOU ARE GOING TO DO IT YOURSELF...

1. Spend time doing research on your 'out-of-the-box' solution and make sure it meets your requirements now and in the future

2. Speak to colleagues or peers that have used the solution to understand it's usability, flexibility, and customer support options

3. Consider 'cloud' based or month-to-month options so that you have the ability to change solutions in the future

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4 LOSS OF CRITICAL BUSINESS DATA

You may lose business data and records during your CRM integration. How do you recover these?

The loss of business data and records could cripple your business. These impacts could extend to revenue loss, negative growth, and loss of reputation.

Even if all of these can be recovered, who will manage this process and how will you ensure all your data and records are completely restored?

IF YOU ARE GOING TO DO IT YOURSELF...

1. Carefully plan your integration process and ensure all risks are mitigated before you start

2. Backup all data and records in case the integration causes data loss

3. Ensure you have a robust and clear recovery plan if you do suffer from any loss of data and records

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5 IS YOUR INTEGRATION SOLUTION VERSATILE?

Does your solution allow integrations with multiple platforms? If not, it could cost you additional time and money.

'Native' solutions, which are usually bundled with your CRM, may only allow connections with a limited number of platforms.

If your software isn't supported, you will need another solution. Prepare to pay more money and spend more time learning about this new platform.

IF YOU ARE GOING TO DO IT YOURSELF...

1. Research your integration solution to understand which software integrations it supports

2. Research other solutions to understand if they offer more versatility and flexibility (I.e. supporting more platforms)

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6 DO YOU HAVE THE SUPPORT YOU NEED?

Who can you call for support? Are they available when you need them?

'Out-of-the-box' CRM integration solutions may offer limited support. This could include trouble finding answers on an FAQ page, support that is only available during business hours, and/or support that only communicates through chat.

'Out of-the-box' solutions usually offer limited support, so you will need to align your activities to the support provided. This could mean doing the integration during business hours, which may interrupt your normal business operations.

IF YOU ARE GOING TO DO IT YOURSELF...

1. Understand what support your integration solution provides *before* you start connecting your software

2. You may need to reorganize your normal business activities around the integration; plan this ahead of time so your team is aware

3. If you need support outside of the hours your integration solution provides, you will need to arrange additional support. This could be an additional cost to your business.

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7 WILL YOUR CRM PROVIDER SUPPORT YOU?

Will you rely on support from your CRM provider? They usually only offer limited support.

Native integration options may seem like the easiest and simplest solutions, but CRM providers only offer limited support.

CRM providers are also not experts in the software you're trying to connect to. You'll be on your own if you have issues with these platforms.

IF YOU ARE GOING TO DO IT YOURSELF...

1. Contact your CRM provider to understand what kind of support they offer as well as their knowledge and experience with the platform

2. Contact your software provider to understand what support they provide and what experience they have with your CRM

3. If you face issues during your integration, be prepared to be the 'middleman' between your CRM provider and software platform

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8 DO YOU KNOW HOW YOUR SOLUTION WORKS?

Do you have full visibility into the integration logic? How can you audit what happens if unexpected data changes occur?

To have confidence in data produced by your integration, you will need to understand the integration logic. For example, you need to know how unique identifiers correlate between the systems and how the integration will present data that cannot be loaded, e.g. due to constraints in the target system.

IF YOU ARE GOING TO DO IT YOURSELF...

1. Ensure unique record identifiers will prevent duplicate record creation

2. Review how errors and data issues will be handled and exposed

3. Read documentation on the logic used within the integration

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9 WILL YOUR CRM SOLUTION GROW WITH YOU?

Can you add more integrations over time? Will you need to buy more software?

Businesses change and the integration requirements you have today will likely change in the future.

Many CRM integration solutions offer limited integration options and may not cover future requirements.

IF YOU ARE GOING TO DO IT YOURSELF...

1. Research your integration solution to understand if they are continually adding platforms or have plans to do this in the future

2. You may need to use different integration solutions for different platforms, adding complexity to ongoing support, upgrades, and management

3. You may need to develop manual 'workarounds' if integration options aren't available. This will likely affect business operations, efficiencies and revenue

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10 YOU'RE INTEGRATION IS DONE! NOW WHAT?

So you've finally connected your CRM to your software. Well done! **Now, who is going to provide ongoing support?**

Your CRM integration is just the first step the process. You will need to consider how the integration will be supported.

This could include updating your CRM, updating your connected software, training, troubleshooting, syncing and reporting.

IF YOU ARE GOING TO DO IT YOURSELF...

1. If you have an IT department they will need to receive additional training to support your CRM and connected software

2. If you don't have an IT department, you will need a plan to support the integration ongoing. This could include a 3rd party technical team which will be an additional cost to your business

3. If you plan to support the integration yourself, you'll need to allocate time each week/month for updates, troubleshooting, data-backing and syncing

'Out of the box' integration solutions are like a day with the kids… Very risky!

Out of the box methods are solutions for a reason, but are they the *best* solution for *your* company? taking a DIY approach without the proper experience could be a **major risk** on your customer data.

Trujay integrations connect your CRM with powerful platforms with ease

CRM INTEGRATION BENEFITS

Have your CRM integration managed with a trusted partner

✔

Get your own Account Manager

Your account manager will oversee your entire integration

✔

FREE Consultation with a CRM Specialist

Speak to a CRM specialist about your integration before we start

✔

Dedicated CRM Integration Specialist

A CRM integration specialist will complete your integration

✔

Our secure software has you covered

We backup your data and restore this ourselves when required

✔

1,000+ integrations & migrations completed

With so much experience, we can troubleshoot any problem

✔

We support over 30 CRM's

We are partnered with and recommended by most CRM's

Our customer-first focus means happy migration & integration customers

Integration Masters!

[Trujay] were WONDERFUL. Integrating our student information system into HubSpot was new territory for us. They worked together with us (marketing) as well as our IT department to walk us through all the details to get the finished solution we were looking for. This integration has completely changed the way we are able to use HubSpot, with real-time data from our internal systems. It's a real game changer!

Kristen Ritterbusch, John Wood Community College
July 10, 2018

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