

Integration – an introduction

# **System integration as a key success factor in the digitalization strategy**



# **How to develop a winning integration strategy in nine steps.**



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# Introduction

You know it: every company uses many different software applications. In addition to the usual communication and operating systems, customer relationship management (CRM), marketing systems, various social media channels, customer administration software, analysis tools and other industry-specific applications are often required. The list goes on and on. Each of these systems works on its own and must be managed individually.

***It doesn't have to be that way!***

There are good ways to connect all these pieces of the puzzle. For example, the marketing, sales, and customer service platform HubSpot can be used to link different applications and synchronize data and information. This gives you a unified overview of your marketing activities and significantly improves your customer relationships. The benefits of integration are captivating.

**Let's go!**

# What does system integration mean and how can it help with digital transformation?

For several years, companies of all sizes have been increasingly relying on digital tools and technologies. The adoption of the latest trends to increase productivity and efficiency, as well as improve processes and results, has increased rapidly.

In their quest to drive digitalization, many companies are forced to abandon their old methods and implement modern processes and systems. Some habits are hard to break. As a result, business owners and employees alike are concerned about the changes that come with digital transformation.

How can your organization ensure that the transition succeeds without losing existing data, systems, processes, techniques, or people?

The integration of existing systems and processes is one possible solution.

## **What does system integration mean?**

Every business has a combination of manual and automated online and offline systems to manage every aspect of its operations. To get the most out of all these components, it's worth taking the step towards integration.

System integration means bringing together the various separate modules, processes, and data systems and allowing them to work together in a unified way.

It enables organizations to streamline operations, strengthen collaboration between departments, and improve operational efficiency.

Not only does this process facilitate the introduction of new IT systems into existing digital environments, but it can also help combine modern systems with legacy ones.

# What are the benefits of system integration?

In recent years, the global market for system integration has grown impressively. This will continue to be the case in the near future. Let's explore why system integration is so important for digital transformation and how it can benefit your business.

## **1. Leveraging synergies leads to greater agility**

With an integrated modern system, your organization no longer needs to host and manage multiple systems and their individual data stores individually. A consolidated system reduces redundancies and repetition and allows valuable resources to be redirected to more critical tasks or areas of operation.

System integration can fully exploit the potential of digital transformation by connecting systems such as ERP and CRM and introducing new elements at any time as needed.

You decide whether you want to opt for an all-in-one solution, i.e. buy everything from the same provider, or choose the 'best of breed approach', where you choose the solution that suits you best and connect it to the other components.

## **2. Improved efficiency**

Working with many systems – some of which may be completely isolated – negatively impacts performance and later results. There can be significant gaps in communication and collaboration. Isolated systems may need to be manually updated with new incoming data. Not to mention the effort you have to put in every time you need to retrieve important information. A lot of time would be wasted on communication between departments for the easiest data exchange, further delaying time-sensitive decisions. Even small mistakes could have catastrophic consequences.

A consolidated digital platform brings you many benefits in terms of greater efficiency.

First, system integration facilitates knowledge transfer by enabling a high level of connectivity between teams and departments. This leads us to the second benefit - a huge time saving. The introduction of a digital system would open up new possibilities for automating everyday and critical tasks. Urgent decisions could be made in real time. Each member of your organization would then be able to focus on more important things, increasing the productivity and efficiency of the entire team.







### 3. New insights

Since the different subsystems all work with different data stores, there is a certain gap that is sometimes difficult or impossible to bridge. Companies are missing out on valuable insights and reports that big data could potentially provide. As a result, they are likely to make important decisions based on incomplete or inaccurate data.

With an integrated system, all relevant people can access all the data they need at any time. This data can then be used to analyse the performance of employees, departments, or the entire organization. The insights you gain about how your organization is running can then be used to make changes needed to improve performance and outcomes.

### Summary

System integration is an essential part of the digital transformation process, a stage without which companies will not be able to reap the true benefits of digitalization. Your goal should therefore not only be to introduce new, innovative IT systems in the workplace, but also to create space for all the customizations needed for a truly digital, frictionless, and unified experience.

# What are the differences between the different forms of integration?

Overall, different integration approaches offer different advantages and disadvantages, and the choice depends on an organization's specific needs, budget, time, and technical resources. It is important to carefully plan the appropriate integration strategy to ensure successful system integration.

Here are some of the most common forms of integration:

## 1. Native integration

Native integration means that the integration with the target system or platform has been developed from the ground up and is part of the original architecture. It is a tailor-made integration created specifically for the two systems that will be connected. Native integrations typically offer high performance and efficiency because they are specifically tailored to the needs of the systems involved. However, this type of integration often requires more development effort and can be more complex.

*Example:*

*Salesforce for HubSpot*

## 2. Plug & Play Integration

Plug & Play Integration refers to pre-configured and reusable integration solutions that can be inserted into existing systems relatively easily. These solutions are often delivered as extensions or add-ons and typically require less development work than a custom integration. Plug and play integrations tend to be quicker to implement and can be more cost-effective. However, they may not be as flexible as bespoke solutions because they are designed for specific use cases.

*Example:*

*Wordpress Integration for HubSpot CRM*



### 3. iPaaS (Integration Platform as a Service)

iPaaS is a cloud-based platform that provides various tools and services to support system integrations. It enables the integration of cloud and on-premise applications, as well as data sources, through a central platform. iPaaS often offers a variety of pre-built integration features, including connectors to popular applications and systems. It facilitates data transfer and data exchange between systems and often also offers monitoring and management functions. iPaaS is a flexible option that helps organizations implement integrations quickly and agilely without having to build extensive infrastructure.

*Example:*

*ChiliDataHub® iPaaS*

#### Summary

The HubSpot ecosystem offers over 2000 integrations, most of which cover the standard objects (company, contact, deal data) and are based on HubSpot's API's and third-party systems.

No such standard solutions are available for local or industry software solutions, such as Abacus, Feratel, Messerli, Proffix, etc. So, it remains either a complete individual development or the use of an iPaaS solution, such as the ChiliDataHub®. This provides the integration with HubSpot with all objects. Regarding the third-party system to be integrated, other technologies are possible in addition to REST API.

### 4. Custom Integration

Custom integration refers to a custom-designed integration solution that is created specifically for an organization's specific needs and requirements. It is a tailor-made solution that considers the specific business processes and systems of an organization. Custom integrations offer maximum flexibility and control over the integration process, but they can also come with higher development costs and times. This type of integration makes sense when a company has specific requirements or complex integration scenarios that can't be covered by pre-built solutions.

# What is a REST API and how does it work?

**REST** stands for „Representational State Transfer“ and is an architectural style often used in the development of web applications and APIs. A RESTful API (or simply REST API) is an API that follows the principles of REST.

Essentially, a **REST API** is an interface that allows different applications to communicate with each other and exchange data. The Hypertext Transfer Protocol (HTTP), which is also used to retrieve websites on the World Wide Web, is often used.

The key principles of a REST API are:

**Statelessness:** Each request to the server from a client contains all the information that the server needs to understand the request. The server does not store any information about the state of the client between requests.

**Resource-based routes:** The API is considered a collection of resources that are accessed through unique URLs. For example, a REST API for a social network might have resources such as „Users,“ „Posts,“ and „Comments“ that can be accessed via appropriate URLs.

**Standard methods:** REST APIs use the standard HTTP methods such as GET (for retrieving data), POST (for creating new resources), PUT (for updating resources), and DELETE (for deleting resources).

**Representation of resources:** Resources are represented in a specific format, such as JSON or XML. The client can use the representation to get information about the resource or modify it.

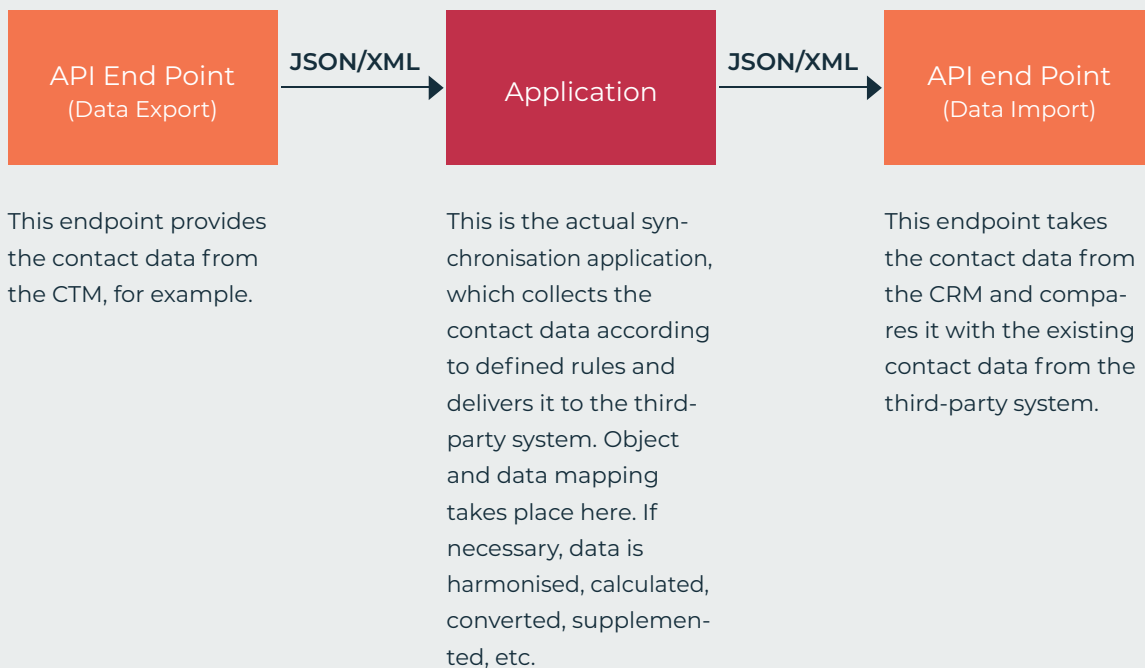
**Hypermedia as the Engine of Application State (HATEOAS):** This principle states that the API should provide the client with links to related resources for the client to explore, rather than requiring the client to already know those URLs.

A REST API is widely used due to its simple and standardized principles, enabling efficient communication between different systems and platforms.



### **Summary**

In more recent times, the REST API has become established as a technology for interfaces in web applications. HubSpot offers a comprehensive, highly documented API. It is important to understand that while an API alone enables simple data exchange, it does not do it independently. So, there is always an application between the so-called endpoints that ensures the logic, the synchronization cycles and the error management.



# How to develop your integration strategy in 9 steps

Defining an integration strategy requires careful planning and consideration of various factors. The following **9 steps** will help you develop your integration strategy.

## Step **1**

**Identify** the business goals: Be clear about the specific business goals you want to achieve with the integration strategy. This could include expanding market share, improving customer experience, increasing operational efficiency, or increasing revenue.

## Step **2**

**Evaluate** existing systems and processes: Evaluate your current systems and processes to identify gaps or areas for improvement. Identify which software solutions are currently in use and assess their capabilities, strengths, and weaknesses.



### Step 3

**Outline specific use cases:** Clearly define the integration goals that align with your business goals. For example, you can streamline customer data across different platforms, improve cross-functional collaboration, or automate certain processes.

### Step 4

**Research** integration solutions: Research and identify software solutions or integration platforms that are a good fit for the high-end segment. Consider factors such as scalability, security, flexibility, and compatibility with your existing systems.

### Step 5

**Prioritize** integration efforts: Determine the order in which you will integrate the various software solutions. Consider factors such as criticality, business process impact, and the potential benefits of the integration.

### Step 6

Develop a **roadmap**: Create a detailed roadmap that outlines the integration steps, timelines, and dependencies. Consider the resources, budget, and expertise required for each step of the integration.



## Step 7

Establish **data standards and governance**: Define data standards and governance practices to ensure consistent data quality and security across integrated systems. Establish protocols for data sharing, data synchronization, and data privacy.

## Step 8

**Ensure user adoption and training**: Plan for user adoption and provide appropriate training to employees who will be working with the integrated systems. Make sure they understand the benefits of the integration and how it fits into their daily workflows.

## Step 9

**Test and validate**: Perform thorough testing and validation of the integration before fully rolling it out to the high-end segment. Identify any issues or bottlenecks and fix them to ensure a smooth integration process.



# Example Use Case

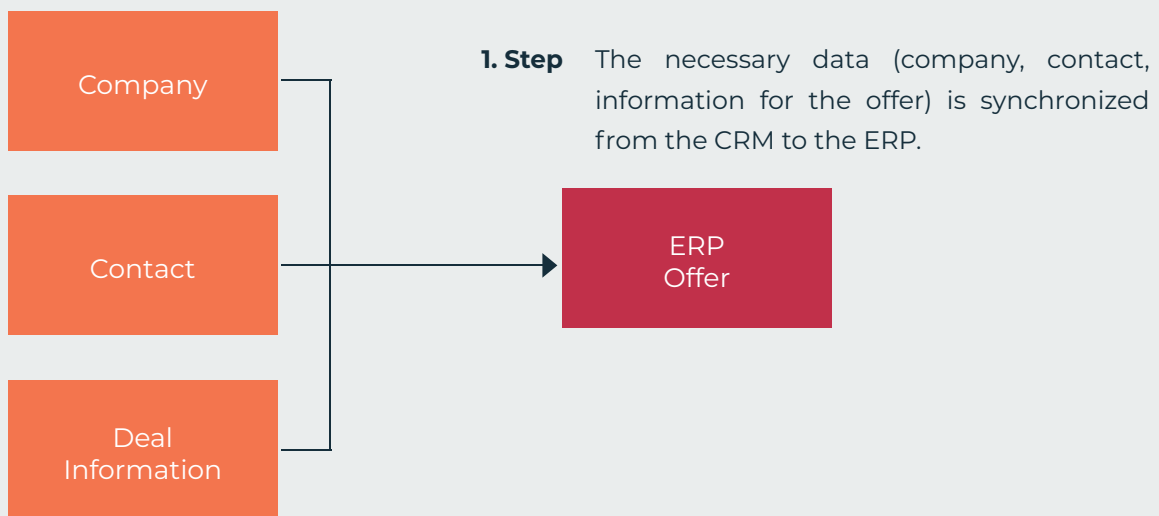
A common use case is the seamless integration of the CRM with the ERP solution to get a true 360° view of the customer. CRM is often understood as a „sales control system“ that is used exclusively by sales/field service. The rest of the company works in the ERP system and processes the actual business cases from the offer to the delivery of the product/service.

It would be better if the CRM was dovetailed with ERP and the specific business cases were also visible on the CRM. In this way, the CRM also becomes a source for marketing decisions. Suddenly, it becomes clear which campaigns and which means are really leading to business.

The integration between CRM and ERP is usually chosen where the transition from a qualified lead to an opportunity happens, or in other words, when it comes to writing a concrete proposal.

At this point, it is important to decide whether the offer should be created in the CRM or in the ERP. If a large assortment has to be accessed or a service has to be configured, the decision usually falls on the ERP, as the effort to map this in the CRM would be too great.

So, let's say the quote is created in the ERP.



## 2. Step

Now the offer is made in the ERP and sent to the customer. The data of the offer and, if necessary, the document as a PDF is returned to the CRM.



## 3. Step

Subsequently, the changes on the business case in the ERP are delivered back to the deal in the CRM. For example, the status change from a quotation to an order.



Depending on the level of detail of the information, conclusions can be drawn about various behavioural aspects:

- Which products are purchased and how often?
- What types of customers buy them?
- When are which products/services purchased?
- Which marketing and sales activities lead to effective deals?

Sales now have a precise view of the customer's sales and how customer behaviour is developing at all times in their customer contacts.

# Do you want to think the digital transformation process through to the end?



**Develop an integration strategy –  
we support you!**

Chili Digital AG

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