

Data Integration Solutions for Salesforce

Informatica's approach to cloud data integration

WHITE PAPER



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Executive Summary

Software as a service (SaaS) is faster to deploy, simpler to upgrade, and 50 to 70 percent less expensive than on-premise equivalents, according to McKinsey Consulting.¹ Yet SaaS still presents organizations with critical challenges:

- SaaS applications such as Salesforce CRM are typically managed by line-of-business users in sales, marketing, human resources, and customer support organizations. In many cases, these end users are also responsible for implementing and supporting the integration solution.
- SaaS applications “in the cloud” must integrate seamlessly with on-premise business data and applications to be able to deliver operational efficiency: providing end users with timely and accurate information when and as needed.
- Although many SaaS projects start at a departmental level with simple integration requirements in their initial phase of deployment, it is common for the integration complexity to grow as end-user adoption increases and the SaaS application becomes part of a broad enterprise architecture.

SaaS applications require specialized integration services to allow smooth, trouble-free operations across the corporate firewall. Yet end users, who have only the most basic IT skills, often must be able to use SaaS applications with minimal IT support.

This white paper describes Informatica’s portfolio approach to SaaS integration and suggests a solution to these seemingly conflicting needs: a data integration approach that scales with customer requirements.

The Growth of Software as a Service

An growing number of companies are adopting SaaS offerings. Research firm IDC predicts that in 2009, the SaaS market will grow more than 40 percent year over year. The same IDC report also predicts that by the end of 2009, 76 percent of all U.S. companies will use at least one SaaS application.²

As companies look for ways to contain costs on IT infrastructure in a struggling economy, three factors make SaaS a popular alternative to on-premise applications:

- **Rapid implementation.** With no hardware or software to deploy and manage, SaaS minimizes the demand on IT resources and speeds time to production.
- **Pricing.** Subscription-based services mean businesses pay only for the resources they use and readily monitor their use to quantify return on investment. This makes SaaS more affordable upfront and easily scalable.
- **Flexibility.** Customizing SaaS applications to adapt to customer requirements takes place through configuration, not coding—something end users often can handle with minimal training.

The Importance of SaaS Integration

Despite the potential benefits of SaaS, it can't deliver on its promise if people can't use it to access all their information on demand—especially if that information is poorly synchronized with corporate systems. In fact, Forrester Research reports that integration issues are software IT decision makers' top concern about SaaS and the main reason they hesitate to adopt it.³

SaaS implementations often begin at a departmental level driven by a specific line-of-business need, later expanding to other departments or to an enterprise level. Because each department stores its own business-critical data in various back-end systems, small SaaS deployments typically have simple integration requirements that can be met with point solutions implemented by the application administrator or a systems integrator with minimal IT support.

Larger SaaS deployments, on the other hand, have more complex integration requirements and must fit into a company's enterprise integration architecture. As a result, they require close collaboration between IT and the line of business, and must be implemented, integrated, and managed by IT using more sophisticated technology.

Typical SaaS integration use cases include the following:

- **Loading information into the SaaS system.** Legacy back-end systems usually contain all the operational and historic data needed by end users; without such data, the SaaS application is not very useful.
- **Synchronizing the SaaS system and back-end systems.** Even with SaaS applications, companies need to maintain current, accurate, real-time databases in-house to ensure secure, reliable visibility into critical data at all times. This is especially critical with data that changes every day, throughout the day, such as customer, sales, inventory, and product information.
- **Extracting information from the SaaS system.** If companies have existing compliance and business intelligence applications, they must be able to transfer information into them from the SaaS solution to generate the wide range of operational and strategic reports those enterprise applications allow.

³IDC, Economic Crisis Response: Worldwide Software as a Service 2008-2012 Forecast Update 2008-2012, Doc # 215504, November 2008.

⁴Base: software-IT decision makers at North American and European Enterprises (multiple responses accepted). "SaaS Clients Face Growing Complexity", Forrester Research, Inc., April 2008.

Different Approaches to SaaS integration

Most mature providers of SaaS applications such as salesforce.com furnish customers and vendors with a Web service-based API for integration. Customers must then decide what approach to employ, based on factors including the size of their company, the availability and sophistication of in-house resources, the size and complexity of the SaaS deployment, and the data volumes they need to process.

For Salesforce customers, these are the three most common integration approaches:

- 1. Hand coding.** Whether done in-house or by consultants, it may seem a quick fix at first, but it can rapidly become time consuming, error prone, and very expensive to maintain.
- 2. On-premise integration platforms and tools.** These are installed inside a company's firewall on a server or an appliance provided by a vendor, then maintained by IT. For organizations where a skilled systems integrator or IT staffer will implement and manage the Salesforce CRM integration, this is a good choice.
- 3. Integration as a service (IaaS) offerings.** This refers to on-demand SaaS integration that itself takes place in the cloud and is maintained by the integration vendor. IaaS is ideal for organizations with limited IT resources and/or those relying on a Salesforce administrator or line-of-business analyst to perform and manage the integration.



CUSTOMER SPOTLIGHT: LINCOLN FINANCIAL GROUP

One of the largest financial services organizations in the United States, Lincoln Financial Group stored customer information across several different systems. This compromised the sales team's productivity as well as its ability to spot opportunities to cross- and up-sell products and services. To create a reliable single view of customer relationships, Lincoln Financial chose to adopt Salesforce CRM, but still needed an affordable way to integrate it with multiple back-end systems with minimal burden on the IT department.

Using Informatica Integration Pack for Salesforce CRM™, the financial firm needed just three months to migrate, replicate, cleanse, and consolidate data from its master data management system, data warehouse, and back-office systems, then synchronize it with Salesforce. Today, more than 1,000 sales representatives can respond to calls faster and suggest additional products more appropriately with easier access to accurate, relevant, timely customer data. Revenues are up, and so is customer satisfaction.

Informatica's Approach to Salesforce Integration

As the recognized market leader in data integration, Informatica has worked with salesforce.com customers of all sizes since 2005 and understands that no single approach to SaaS integration will meet every customer's needs. Accordingly, we have created a complete portfolio of data integration solutions for Salesforce CRM and the Force.com platform. These solutions enable companies to ensure data accuracy, improve business decisions and operations, and derive maximum value from their Salesforce investment.

For Salesforce administrators looking to quickly synchronize their Salesforce data with on-premise systems, Informatica offers several easy-to-use, self-service IaaS offerings called **Informatica On Demand services**.

For organizations that are looking for an easy-to-use Salesforce integration offering that is designed for IT professionals, Informatica offers a powerful and affordable on-premise solution, **Informatica Integration Pack for Salesforce CRM™ (iPack)**.

For organizations that already use Informatica PowerCenter, our flagship data integration software, Informatica offers a native Salesforce connector, **Informatica PowerExchange® for Salesforce CRM™**.

Informatica On Demand services have been deployed by more than 100 salesforce.com customers of all sizes and were recently voted "Best Data Integration Tool of 2008" by salesforce.com customers on AppExchange for their ease of use. Informatica's on-premise data integration solutions are deployed at many of salesforce.com's largest customers around the world. These solutions are often used to handle complex business rules in real time and process very large volumes of data.



Figure 1. The Informatica On Demand Data Loader Service™ was named the 2008 "Best Data Integration Tool" on Force.Com AppExchange.

Integration as a Service: A Simpler Choice for SaaS Integration

Salesforce and other SaaS applications are most popular among small and mid-sized companies and individual departments that choose cloud applications for affordability and ease of management. Traditional integration options such as hand coding or on-premise integration tools tend to be a poor fit for these users.

Furthermore, such solutions are far beyond the minimal expertise of the line-of-business employees who generally manage Salesforce and other SaaS applications. In an economy where IT already lacks the resources to respond to every request from the business, this delays data integration projects until an IT professional can squeeze them into an already overloaded schedule—which may take weeks or even months.

As a result, IaaS is the emerging alternative to integrating cloud-based services with on-premise applications. As with other cloud-based applications, IaaS is flexible, easy to use, and speeds time to value for a lower total cost and higher return on investment.



CUSTOMER SPOTLIGHT: BAX GLOBAL

At international freight transportation and supply chain management firm BAX Global, the inside sales department uses Salesforce CRM to support up to 120,000 active but smaller business-to-business accounts. Integrating Salesforce with the back-end systems where BAX Global stores customer data would require hours of hand coding for which the IT department had no time. Yet without that integration, the inside sales department was juggling up to 1,000 accounts per representative with no detailed, real-time way to identify opportunities to cross-sell, up-sell, and identify new opportunities.

BAX Global adopted Informatica On Demand services to leverage its existing investment in Informatica PowerCenter®, which it was using to re-engineer its legacy mainframe-based data warehouse system. The cloud-based solution synchronizes data between Salesforce CRM and internal systems such as relational databases and contact center statistics, keeps the Salesforce data up to date and accurate, and ensures high levels of data quality. As a result, the inside sales team can more easily spot opportunities to increase sales—resulting in a 270 percent increase in revenues from these smaller accounts and a 12 percent increase in customer revenues overall.

Informatica On Demand Services: IaaS from the Integration Experts

Informatica On Demand services are true cloud-based, multitenant IaaS offerings that automate moving, monitoring, and synchronizing data between back-end systems and Salesforce CRM. End users need only launch their preferred Web browser and log in to Salesforce CRM to integrate data from multiple databases and business applications.

Informatica On Demand services fall into two categories:

1. **Powerful and flexible IaaS tools.** These tools are designed from the ground up to address the needs of line-of-business users. They allow a Salesforce administrator to quickly build any number of integration tasks to synchronize Salesforce data with corporate back-end systems. The **Informatica On Demand Data Synchronization Service™**, which synchronizes Salesforce data with on-premise, back office databases and systems, is an example of an IaaS tool. Informatica plans to deliver a data cleansing service in the near future.
2. **Turnkey IaaS applications.** These applications are designed for a specific integration task and require absolutely no training to use. They work “out of the box” and are the fastest way to accomplish such specific tasks as loading, replicating, or assessing quality of data. Best of all, they coexist with and complement any data integration tool or method that salesforce.com customers might have deployed. Informatica has developed three turnkey IaaS applications for Salesforce CRM:
 - **Informatica On Demand Data Loader Service**, which imports and exports data between Salesforce CRM and files or databases
 - **Informatica On Demand Data Replication Service**, which replicates Salesforce data to internal systems for analysis or archiving
 - **Informatica On Demand Data Quality Assessment Service**, which combines powerful data analysis, matching, reporting, and monitoring to ensure that data is complete, consistent, and accurate

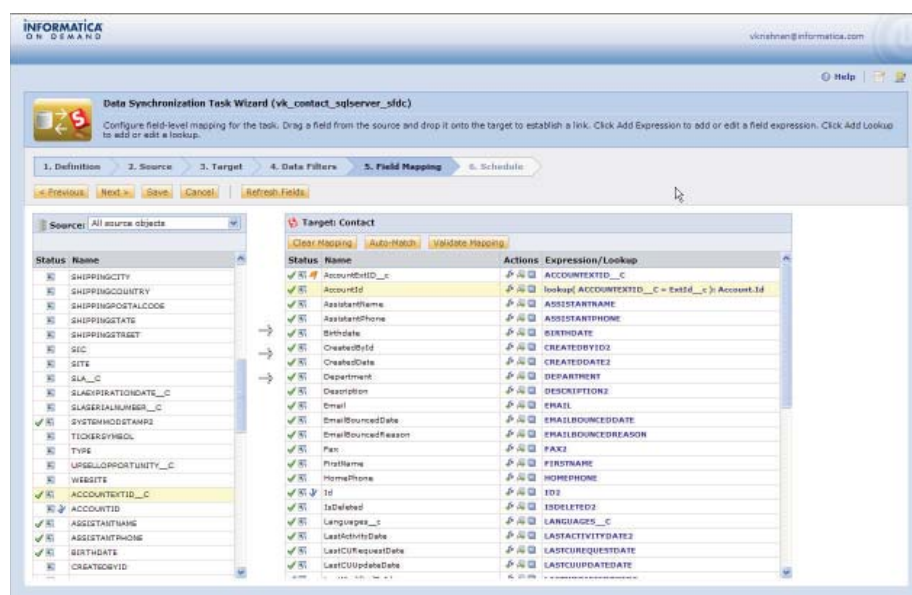


Figure 2. The Informatica On Demand Data Synchronization Service makes integrating Salesforce and back office applications data quick and easy. Use a simple wizard to automatically map like fields between source and target, apply filters, and set synchronization schedules—all from a Web browser.

Over time, Informatica will enable partners to deliver their own process-specific integration solutions in a similar manner.

Informatica On Demand services expedite time to value by eliminating hand coding completely. Based entirely “in the cloud,” these services are designed to integrate directly with both Salesforce and a variety of common on-premise systems and databases. Simple Web-based set-up wizards and drag-and-drop functionality empower Salesforce administrators to create their own complex automated data transformation tasks in a matter of hours—with minimal help from IT.

Informatica On Demand services are also fully automated. Once a Salesforce administrator creates and schedules a job, these services handle all the steps needed to keep data consistent and current. This minimizes errors while freeing the IT staff to work on other things. It also ensures results are precisely as timely as they need to be. Administrators can easily schedule jobs to run daily, hourly, or by minutes for near real-time synchronization, or less frequently for less time-sensitive scenarios. They can even create sequences of jobs in which the results of one drive the next, for faster response to shifting business conditions.



CUSTOMER SPOTLIGHT: MONSTER.COM

Monster.com’s MonsterTRAK division connects more than a million college students with companies looking for interns and entry-level employees. The company needs to crunch vast amounts of job, employer, and applicant data daily to support its pricing, promotions, and staffing strategies. However, with no reporting module for its Oracle data mart, top executives had to ask already overworked database administrators to query the database, generate spreadsheets, and analyze the results. This often delayed urgent decisions for weeks.

Today, however, Informatica On Demand services let MonsterTRAK’s executives create their own detailed financial and marketing reports every morning using the same Salesforce tools that help Monster.com’s advertising and telesales departments track their performance. It took the company’s only Salesforce.com administrator less than a month to import every MonsterTRAK data set into Salesforce, create and schedule jobs, and build appropriate reports and dashboards—while still working on other projects.

Based on the Informatica Platform

Most importantly, Informatica On Demand services are based on Informatica's comprehensive data integration platform, which enables users to access, discover, cleanse, integrate, and deliver timely, trusted data to the extended enterprise—any data, anywhere, at any time.

With proven reliability, scalability, and security, the Informatica Platform is capable of processing the largest data volumes and most complex business rules.

Leveraging the power of the Informatica Platform, Informatica On Demand services offer the convenience, usability, and flexibility of on-demand deployment and a user interface designed for the line-of-business end user. For the cost-conscious business, these standalone services help companies maximize the benefits of their Salesforce and other SaaS applications today and in the future, as their business needs, technology, and data integration challenges grow and change.

Conclusion

Integrating cloud-based application data with on-premise systems is a new IT challenge that requires a new approach: integration as a service (IaaS). IaaS must be easy for a new type of user: someone with minimal IT experience who needs results on demand, doesn't want to spend a lot to get them, and can't pull the IT team away from other responsibilities.

IaaS must provide intuitive dashboards, easy-to-use setup wizards, and admin-friendly productivity tools that let Salesforce administrators handle every step of the integration process themselves, with minimal help from IT. IaaS makes Salesforce administrators more self-sufficient and productive.

The answer isn't to host an on-premise software solution or appliance originally designed for IT users and simply call it "a cloud solution." Informatica has done something entirely different. With 15 years of enterprise data integration experience, global resources, and a major R&D investment, Informatica has developed an innovative suite of IaaS offerings called Informatica On Demand Services.

These robust data integration services are expressly designed for on-demand deployment and for ease of use. By radically simplifying the user experience, while providing a robust, scalable data integration solution, Informatica delivers on the promise of cloud data integration.

Learn More

Learn more about **Informatica On Demand services**. Visit www.informaticaondemand.com or call 888.345.4639.

About Informatica

Informatica enables organizations to operate efficiently in today's global information economy by empowering them to access, integrate, and trust all their information assets. As the independent data integration leader, Informatica has a proven track record of success helping the world's leading companies leverage all their information assets to grow revenues, improve profitability, and increase customer loyalty.



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