

# AmerisourceBergen Specialty Group Case Study

## *Streamlined Salesforce.com migration and integration*




Specialty pharmaceutical distribution and services provider; subsidiary of a \$70 billion, multinational pharmaceutical services company.



Challenge	Solution	Results
<ul style="list-style-type: none"> <li>▪ Replace legacy, custom CRM solution and migrate to salesforce.com</li> <li>▪ Improve data integration methodology and process without the need for high cost specialists</li> <li>▪ Efficient allocation of key personnel – improve focus on strategic activities vs. tactical ones (such as integration)</li> </ul>	<p><b>Cast Iron Integration Appliance</b></p> <ul style="list-style-type: none"> <li>▪ Configuration-driven integration between data warehouse and salesforce.com <ul style="list-style-type: none"> <li>▪ Simple “No Coding” approach</li> </ul> </li> <li>▪ Integration development aligned with SOX driven SDLC process</li> <li>▪ 10 nightly batch (500k rows) and 2 real-time activities (quote and order details) integrating data on 100k+ customer accounts</li> </ul>	<ul style="list-style-type: none"> <li>▪ Retired legacy CRM &amp; replaced custom data integration services. <ul style="list-style-type: none"> <li>▪ Launched nearly 400 seats on salesforce.com in phases over a six-month period.</li> </ul> </li> <li>▪ Reduced dependence on specialist skills, focusing on development by systems analysts</li> <li>▪ Support for geographically distributed teams via Cast Iron Web Console</li> </ul>



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# Awana Case Study

## *Sales Order Visibility with JD Edwards*




Non-profit philanthropic organization



Challenge	Solution	Results
<ul style="list-style-type: none"> <li>Multiple integration needs: <ul style="list-style-type: none"> <li>Accounts, contacts to Address Books</li> <li>Sales order status from ERP to SFDC</li> <li>Invoice info from ERP to SFDC</li> </ul> </li> <li>Considered both SFDC &amp; Microsoft CRM</li> </ul>	<p><b>Cast Iron Integration Appliance</b></p> <ul style="list-style-type: none"> <li>Simple "No Coding" approach</li> <li>Bidirectional integration with JD Edwards: <ul style="list-style-type: none"> <li>Sends accounts &amp; contacts to JDEdwards (Oracle DB)</li> <li>Extracts sales orders and invoice info from JD Edwards (XML API)</li> </ul> </li> <li>Eliminated: Custom code</li> </ul>	<ul style="list-style-type: none"> <li>Complex integration delivered within one month</li> <li>Eliminated 75% man-hours required for managing customer information</li> <li>Simplicity of integration a major factor to choose SFDC over Microsoft CRM</li> <li>Field Notifications reduced from 30 days to 24 hours</li> </ul>

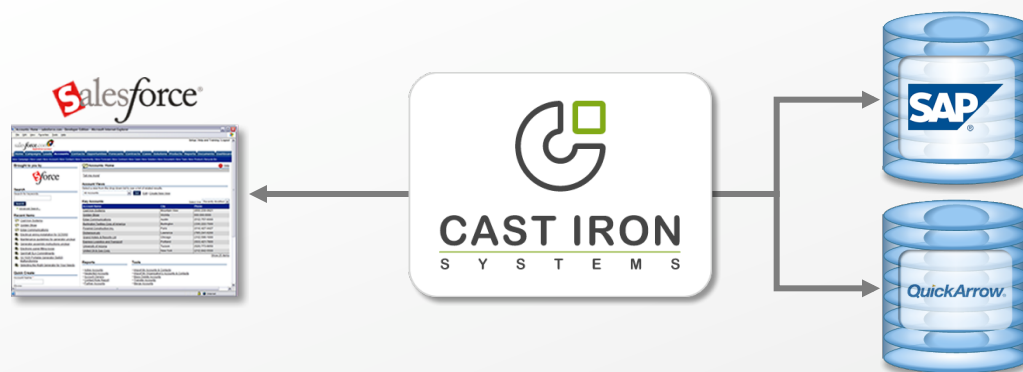


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# Endeca Case Study

## *Sales Order Integration*



Challenge	Solution	Results
<ul style="list-style-type: none"> <li>Multiple integration needs - needed to automate manual processes between:               <ul style="list-style-type: none"> <li>Finance and sales/marketing</li> <li>Finance and services</li> </ul> </li> <li>Alternatives considered               <ul style="list-style-type: none"> <li>Custom code – resource intensive</li> <li>Pervasive – too complex</li> <li>SAP XI – overkill</li> </ul> </li> </ul>	<p><b>Cast Iron Integration Appliance</b></p> <ul style="list-style-type: none"> <li>Simple “No Coding” approach</li> <li>Integrated:               <ul style="list-style-type: none"> <li>SAP to SFDC: order and contracts status</li> <li>SAP to QuickArrow: order status</li> <li>QuickArrow to SAP: time and expense data for invoicing and employee reimbursement</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>30% increase in productivity using SAP and Cast Iron together</li> <li>Automates previously manual order management process</li> <li>Faster revenue recognition</li> </ul>



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# Extra Space Storage Case Study

## Customer Master Integration



Leading Self Storage Company



### Challenge

- Needed real-time, bi-directional integration between CRM (Salesforce.com) and ERP (Centershift STORE)
  - Improve call center visibility across customer contact channels
  - Account and contact integration
- Needed Cloud-based integration solution to align with corporate IT strategy


### Solution

- Cast Iron Cloud™**
- Integration-as-a-Service with no on-premise footprint
  - Synchronize customer contact channels (call center, store, and web)
  - Real-time, bi-directional integration between CRM (Salesforce.com) and ERP (Centershift STORE)

### Results

- Project delivered in 21 days
- 100% configuration-based, no coding
- \$97k first year savings compared to custom code



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# Foundry Networks Case Study

## *End-to-End Order to Quote*



Leading provider of high-performance enterprise switching, routing, security and web traffic management solutions



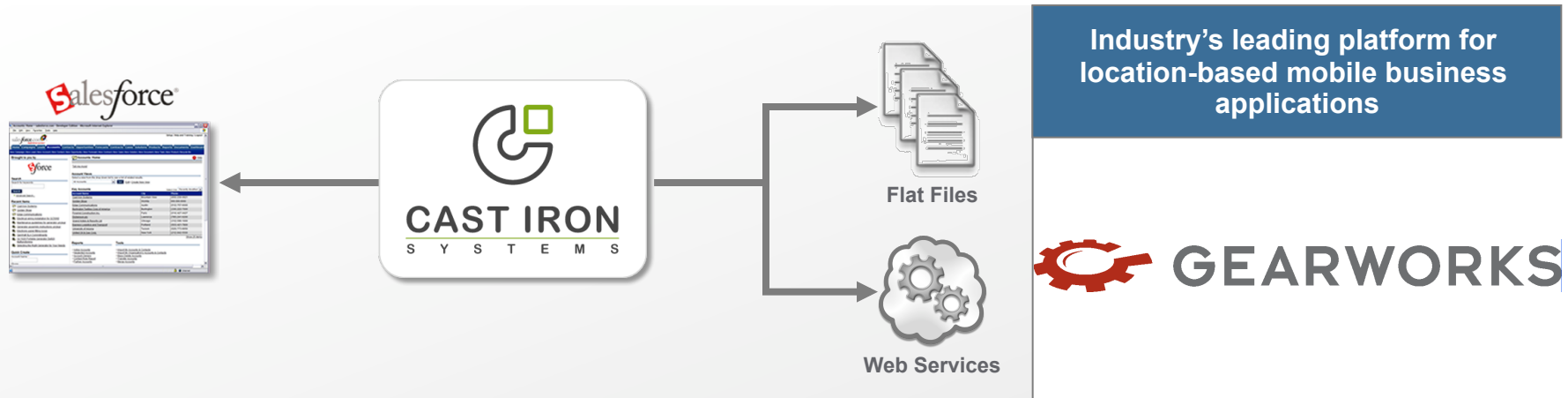
Challenge	Solution	Results
<ul style="list-style-type: none"> <li>▪ Provide integration between SFDC and Oracle 11i</li> <li>▪ Previous process manually intensive <ul style="list-style-type: none"> <li>– Duplicate data entry</li> <li>– Reliance on email and phone as communication channels</li> </ul> </li> <li>▪ Consider Oracle Fusion but rejected due to complexity</li> </ul>	<p><b>Cast Iron Integration Appliance</b></p> <ul style="list-style-type: none"> <li>▪ Fully automated order-to-quote</li> <li>▪ Real-time integration between multiple systems:</li> <li>▪ Bi-direction flow and real-time notification of order processing</li> </ul>	<ul style="list-style-type: none"> <li>▪ Eliminated data re-entry</li> <li>▪ Increased order creation throughput</li> <li>▪ Real-time visibility into all stages of process</li> </ul>



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# Gearworks Case Study

*Rapid customer on-boarding and new revenue opportunities*



Challenge	Solution	Results
<ul style="list-style-type: none"> <li>▪ Rapidly on-board new customers to fuel corporate growth</li> <li>▪ Improve customer service by providing access to carrier billing information</li> <li>▪ Small growing company with limited funds to spend on Integration</li> <li>▪ Custom code quickly becoming too expensive and unmanageable</li> </ul>	<p><b>Cast Iron Integration Appliance</b></p> <ul style="list-style-type: none"> <li>▪ SaaS model allows Gearworks to solve integration and grow customer base</li> <li>▪ Integration now seen as a competitive differentiator to major telco's including Sprint and Verizon</li> </ul>	<ul style="list-style-type: none"> <li>▪ Improved customer satisfaction due to enhanced self-serve options               <ul style="list-style-type: none"> <li>▪ Reduced customer attrition</li> </ul> </li> <li>▪ Integration platform enabled new revenue opportunities by offering "Integration-as-a-Service"</li> </ul>

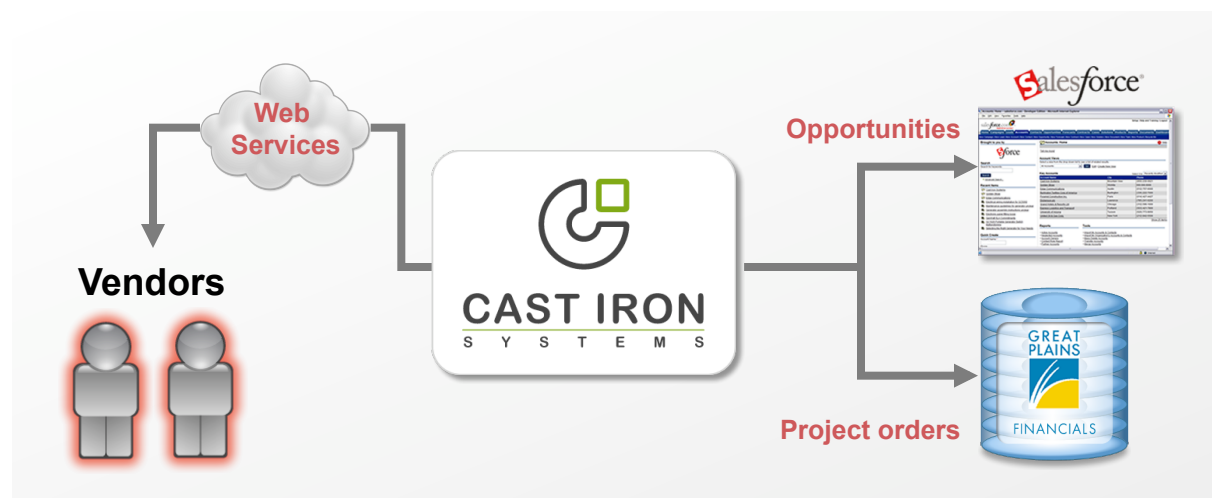


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# Grizzard Case Study

## Customer & Product Master Integration with Legacy and Great Plains




A direct response marketing agency



Challenge	Solution	Results
<ul style="list-style-type: none"> <li>Multiple integration needs:               <ul style="list-style-type: none"> <li>– Cust/Prod master sync with GP</li> <li>– Incoming order information from vendors to SFDC opportunities</li> <li>– Send orders to Direct Mail vendors</li> <li>– Convert opportunities in SFDC into Project Accounting orders in Great Plains (GP)</li> </ul> </li> <li>Eliminate manual re-keying of data</li> <li>Custom code not scalable</li> </ul>	<p><b>Cast Iron Integration Appliance</b></p> <ul style="list-style-type: none"> <li>Integration across multiple systems:               <ul style="list-style-type: none"> <li>– SFDC and Vendors via Web Services</li> <li>– SFDC and SQL-server based legacy application</li> <li>– SFDC and Great Plains (Phase II)</li> </ul> </li> <li>Eliminated: Pervasive and BizTalk               <ul style="list-style-type: none"> <li>– Programming &amp; labor intensive</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>First phase of integration completed within 20 days</li> <li>Automated sales order processing across CRM &amp; ERP</li> <li>Improved operating efficiencies with vendors due to automation</li> </ul>



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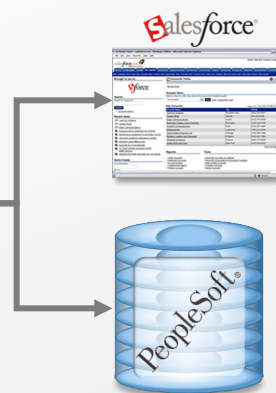
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# GTSI Case Study

## *Sales Order Integration*

Data Warehouse



IT enterprise infrastructure solutions  
and services provider



### Challenge

- Multiple integration needs:
  - SFDC to Peoplesoft
  - SFDC to data warehouse
- Streamline processes:
  - Sales opportunity management
  - Customer service
- Alternatives considered:
  - Custom code - too time consuming


### Solution

- Cast Iron Integration Appliance**
- Simple “No Coding” approach
- Multiple integrations with SFDC:
  - Sales: exchanges quote info with Peoplesoft
  - Customer service: extracts customer info from data warehouse (Oracle 10g)
- Eliminated: Custom code

### Results

- Integration completed in 14 days
- Increased productivity for:
  - Sales
  - Customer Service
- Increased SFDC adoption
- Minimized ongoing maintenance



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# Lawson Case Study

## Rapid Data Migration & Integration with ERP



MidTier ERP solutions company

# LAWSON

### Challenge

- Data Migration/Integration needs:
  - Siebel to Salesforce.com
  - Intensia SMS to Salesforce.com, etc.
- Integration critical to Pipeline data
- Two main integration needs:
  - Speed – Urgent need to meet deadline
  - Flexibility - to interact with variety of formats (SQL, Web Services, Flat File, etc)

### Solution

- **Cast Iron Integration Appliance**
  - Simple “No Coding” approach
  - Connects Salesforce.com with:
    - Lawson, . Data Warehouse, Custom Apps
  - Appliance used as integration standard for front to back office integration
  - Eliminated: Custom code

### Results

- Integration completed in 5 days
- 80 hrs of coding time replaced by 8 hours of configuration
- Labor savings of \$513,000 over first three projects



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# LENOX Case Study

## Customer Master Integration




### Premium Performance Tools



Challenge	Solution	Results
<ul style="list-style-type: none"> <li>Multiple integration needs for globally distributed Sales teams:               <ul style="list-style-type: none"> <li>Customer contact info</li> <li>Customer discount programs</li> </ul> </li> <li>Current synchronization process               <ul style="list-style-type: none"> <li>Manual</li> <li>Time consuming</li> <li>Error Prone</li> </ul> </li> </ul>	<b>Cast Iron Integration Appliance</b> <ul style="list-style-type: none"> <li>Simple “No Coding” approach</li> <li>SFDC integration with Oracle DB:               <ul style="list-style-type: none"> <li>Sends customer contact info to SFDC</li> <li>Sends customer discount program info to SFDC</li> </ul> </li> <li>Eliminated: Custom code</li> </ul>	<ul style="list-style-type: none"> <li>Increased productivity of sales teams by eliminating time consuming, manual data entry process</li> <li>Customer info automatically shared across globally distributed teams</li> <li>Improved accuracy of data provided to field sales</li> </ul>



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# RJF International Case Study

## *Sales Order Integration*



Wallcovering Manufacturing/  
Distribution

RJF International Corporation

### Challenge

- Data Migration/Integration needs:
  - Migrate customer accounts from Reed Construction to SFDC
  - Integrate customer leads from Infor ERP System 21 to SFDC
- Urgent deadline to roll-out SFDC: lack of customer data resulting in lost sales
- Custom code not scalable

### Solution


#### Cast Iron Integration Appliance

- Simple “No Coding” approach
- Migrate/Integrate:
  - Customer accounts from Reed CRM to SFDC
  - Sample orders from Infor System 21 ERP (DB2/AS400) to SFDC
- Eliminated: Custom code

### Results

- Integration in 10 days
- Increased visibility in sales pipeline for management
- Improved efficiencies:
  - Customer Service automatically sends sample orders as leads
  - Sales obtain lead notifications earlier

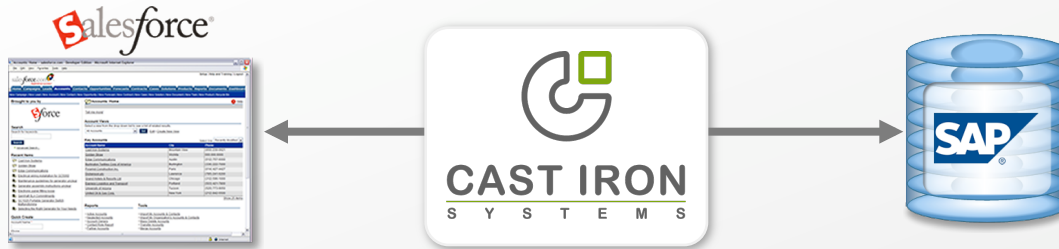


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# Siemens Energy Case Study

## *Sales Order & Invoice Visibility*




Division of One of the World's  
Largest Manufacturing Companies

# SIEMENS

Challenge	Solution	Results
<ul style="list-style-type: none"> <li>▪ SAP is worldwide standard for order mgmt &amp; financials and Salesforce.com for CRM</li> <li>▪ ERP to CRM processes not harmonized               <ul style="list-style-type: none"> <li>– High demand for reporting key business performance</li> <li>– Need visibility of orders, shipments and invoices within Salesforce.com</li> </ul> </li> <li>▪ Limited in-house developer support</li> </ul>	<p><b>Cast Iron Solution:</b></p> <ul style="list-style-type: none"> <li>▪ Cast Iron used for real-time, bidirectional integration between ERP and CRM</li> <li>▪ Phased approach to success:               <ol style="list-style-type: none"> <li>1. Copy invoice and order status information from SAP to Salesforce.com Opportunity</li> <li>2. Create and synchronize Product Line Item details from SAP to salesforce.com</li> </ol> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Phase I and II in production               <ul style="list-style-type: none"> <li>– Phase I delivered in two weeks</li> </ul> </li> <li>▪ Greater visibility in Salesforce.com = more rapid adoption by sales community</li> </ul>



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