

OPERATOR: Thank you for joining us, and welcome to the IT Insider Secrets to Successful CRM and ERP Integration Webinar. I would now like to introduce the speakers.

Randy Berger is the IT manager of process and application development at Seimens Energy here in the U.S. To this role, he brings a very diverse background from over 15 years in manufacturing engineering and quality management as well as over 10 years in product, process and project management.

Randy has been a system administrator for their salesforce.com [instance] since 2002 and has IT responsibility for all customer-facing applications and supporting processes. He has an MBA from the College of William and Mary and has been certified as a project management professional with PMI.

Jaime D'Anna is the senior product marketing manager at Cast Iron Systems, an IBM company driving product marketing activities ranging from corporate messaging, channel enablement and product positioning to leading strategic programs and collateral creation.

With over 15 years of professional experience, Jaime has held roles in product marketing, product strategy and presales engineering for various ERP, CRM and Internet applications in companies such as Oracle, Open Text and

Documentum. He holds a Bachelor of Science degree from Santa Clara University as well as a number of industry and regulatory certifications.

I would now like to introduce today's moderator, Jaime D'Anna, senior product marketing manager at Cast Iron Systems, an IBM company. Jaime, over to you.

D'ANNA: Thank you so much, Judy, and thank you for joining us today on the Webinar entitled, IT Insider Secrets to Successful CRM and ERP Integration. My name is Jaime D'Anna, senior product marketing manager at IBM Cast Iron, number one in cloud integration.

Many of you may have already been considering adopting a cloud strategy such as implementing SaaS applications like salesforce.com CRM, and others of you may have already deployed a SaaS application and are seeking to maximize your investments by integrating the SaaS with your on-premise applications. In both scenarios, we will show you how partnering with IBM Cast Iron can enable you to accomplish your goals of integrating to the cloud.

So, let's take a moment to set expectations by going over today's agenda. I'll start off with a brief overview of Cast Iron at IBM and the WebSphere Cast Iron Cloud Integration solution. Then I'll follow that with some

background on challenges our customers have been facing as they try to connect their enterprise to the cloud.

In that context, we'll talk about WebSphere Cast Iron Cloud Integration and how it was designed specifically to meet the challenges our customers are facing. Then we'll hear from one our most esteemed partners, Seimens, about some specific business challenges they were facing which were resolved through successful integration.

I'll follow this with a live demonstration of WebSphere Cast Iron Cloud Integration; then, open it up to some questions and answers as many of you in the audience may have some challenges described in this Webinar and might find them relevant to what you're currently facing in your own environment.

So, to start off, I'd like to briefly highlight some relevant facts about Cast Iron within IBM as a company. Early on, we identified ourselves as number one in cloud integration and we can make this assertion as we've been around for nearly 10 years and have established our presence as thought leaders in the cloud integration space pioneering strategies and technologies for SaaS and cloud integration with specific emphasis on speed and simplicity.

We often use a tagline, "integration in days," because we

have many customer case studies and proof points where we've done just that, including our esteemed colleague who you'll hear from in just a bit.

In total, we have thousands of customer integrations successfully connecting cloud and on-premise applications, so our success in solving these integration issues has led to consistent growth as a company in no small part due to our satisfied customer base as evident in our retention rate of 96 percent -- we're extremely proud of that.

The speed, simplicity and effectiveness of our solution is recognized as a best in class solution by a number of awards, all of which we proudly invite you to view on our Web site in detail.

So, Cast Iron as a company as well as its solution has resonated within the analyst community for years. In fact, Cast Iron's best of breed technology, successful cloud integration strategy and satisfied customer base were among the top drivers which prompted IBM to acquire Cast Iron as a company.

So now, to set the stage, many organizations just like yourselves are either considering or have adopted a public cloud or SaaS application such as salesforce.com CRM due to many of the benefits and considerations such as ease of use

in deployment, reduced maintenance efforts and overall cost effectiveness. In fact, with a compound annual growth rate of 27 percent, it is the fastest-growing sector in the software industry today.

But the reality is while many customers are adopting public cloud or SaaS applications such as salesforce.com or building their own private cloud applications on an infrastructure such as maybe salesforce's force.com, they still use and maintain their enterprise on-premise applications such as an ERP like SAP or other packaged applications and even homegrown applications built on standard database architecture such as SQL or Oracle.

And this has created a hybrid environment. As such, there's a need to connect the cloud applications with their existing on-premise applications which in many cases aren't going anywhere any time soon. And why would we want to do this? this is done to optimize performance of all these applications working in tandem, as well as to increase sales productivity and potentially maximize resources and investments.

So, once the need for integrating two key systems such as their CRM and ERP applications has been assessed, you might realize that there are a number of other applications in your enterprise which may have dependencies and effects on

your data such as billing, inventory or even a database containing all customer master data.

So this growing complexity is why customers just like you have been seeking solutions to integrate the data -- that business critical key data -- from all of their departmental applications. So, previously what our customers have noticed is that while application integration needs are growing more and more complex, the available solutions have been limited.

So, let's take for an example custom code. If an organization has enough IT resources and programmers to create a one-off custom integration solution, this can often be an often tempting proposal. However, this presents a number of resource intensive hidden costs such as in maintenance, support; and, any future changes should the need arise to grow the solution to integrate more applications...

...that factor of scalability can often be a hinderance because of the fact that, I like to say, when the lady with the recipe dies, or that person who knows that code inside and out decides to leave the organization, the organization is at times hard-pressed to find out where do we go from now? Who has that same skill set as the person that built our initial solution?

So, the second option that people look for is an on demand specializing in simple cloud-to-cloud connectivity. While this may be also a tempting low-cost alternative for simple cloud-to-cloud integration projects, it doesn't offer that scalability and functionality to address on-premise or hybrid scenarios. So, in short, pure on demand point-to-point solutions are not equipped to handle complex processes in back office applications.

The third option one would want to consider possibly would be a traditional on-premise solution. Now, these solutions are based on a more classic ETL architecture -- that's Extract, Transform and Load -- and these are designed for extracting, processing and storing large quantities of data.

This older architecture also equates to a longer installation and implementation time as well. So, it will most likely leave a much larger IT footprint.

Most importantly, SaaS applications are still almost an afterthought to these vendors -- meaning, they may have a cloud solution as well, but it's completely separate to their core product on-premise solution so you'll end up purchasing and maintaining two or more complex systems to resolve one problem.

So it's due to the complexity of the hybrid world plus the

shortcomings of the offerings we just described that integration is among the top concerns for IT executives when it comes to adopting SaaS applications. And this is only second to security on their list.

And this is reflected by a recent survey by Saugatuck, arguably the leading analyst for cloud computing. When Saugatuck asked a group of IT executives what were their top concerns regarding deploying and adopting SaaS as far as a solution, integration was as I said second only to security on their list.

The concern for integration was not only relevant to enterprise applications but the same concerns came up for flat files and other data structures such as SaaS applications as well. So we've seen that these concerns coupled with the fact that previous product offerings described failed to provide adequate reassurance due to their limitations has created an environment where many IT organizations have felt hesitation if not outright rejection of SaaS applications as reflected by a survey by Gartner.

So, we can see the complexity of integration applications has absolutely been a driving factor for adoption and implementation of SaaS solutions. So, the complexity of integrating the cloud applications to the enterprise and the limitations of current solutions available are precisely why



IBM Cast Iron developed WebSphere Cast Iron Cloud Integration for organizations just like yours.

WebSphere Cast Iron Cloud Integration was designed to meet the specific needs of connecting your cloud applications, on-premise applications and any hybrid environment between the two. It can connect one to one or scale to connect one to many application endpoints, or even many to many as you'll see in our case example with Randy Berger and Siemens coming up.

This provides a platform to effectively and rapidly consolidate and manage the application functionality in your enterprise regardless of how it was deployed. What makes WebSphere Cast Iron Cloud Integration stand out from the three previous integration options mentioned are that it is rapid, flexible and simple.

So, let's go into a little bit of more detail on why being rapid, flexible and simple makes this platform unique as well as the preferred option for organizations seeking to integrate their applications.

The first and most arguably the most important point is WebSphere Cast Iron Cloud Integration provides rapid success due to the many features and functional sets that the product is based on, which comes from customer requirements

just like you and our leadership in the cloud connectivity space.

This includes the need to provide not only native connectivity to industry-leading SaaS and enterprise applications, but every type of database, custom application, Web service and connectivity protocol.

Second, WebSphere Cast Iron Cloud Integration is the only platform available that provides a complete flexibility in deployment options. In other words, you can build, run and manage an integration between applications such as salesforce.com and SAP and deploy it using a physical on-premise appliance, a virtual appliance, or completely in our multi-tenant cloud service.

It is the only solution that allows for this choice of deployment using the same product and code base interchangeably. Because of this, it is future proof -- meaning, you can start off with one form factor today and easily move to another one over time to scale to your particular IT strategies.

Another important feature is simplicity, specifically a "configuration, not coding" approach. WebSphere Cast Iron Cloud Integration provides a simplified user-friendly template-based approach via the Template Integration Process

-- or, TIP.

These are templates of common integration scenarios which can be used as a starting point for your integration projects. You're not alone in your integration needs and should not have to reinvent the wheel. So, Cast Iron gives you the benefit of previous success and best practices available through our community of customers.

And finally, this is one platform for all types of projects, so you can use WebSphere Cast Iron Cloud Integration for data migration, process integration or even UI mashups --that is, taking relevant data from a back office application such as SAP and displaying it within a commonly-used front office application such as salesforce.com CRM.

So, to quickly recap, the value of complete solutions that are rapid, flexible and simple translates to lower risk, saving time, saving cost associated with building or deploying connectors for each new project, and having one platform for all types of integrations. This means an increase on your return on investment and a lower TCO or Total Cost of Ownership.

So, that's the high-level overview of what makes WebSphere Cast Iron Cloud Integration complete as an integration

platform and why it maps to your particular cloud strategies. Cast Iron took these functional requirements coming from organizations like yours and saw a deficit in the existing product offerings available in the market.

So, it architected this platform with the goal of completely mapping to your organization's cloud strategy by providing all the functionality needed to meet the integration goals and requirements that IT and business were demanding.

So, using line of business as an example of why you would want to do some types of integration which would empower your particular lines of business, we're going to take a look at placing ourselves in the shoes of someone on an account team in any given organization.

So, it goes without saying that in today's environment, proactive manufacturing companies are looking for that competitive edge, namely when selling. And many IT organizations have sought best of breed technology, namely the user-friendly cloud CRM system such as salesforce.com for their account teams as a single point of access for all of their customer information.

During the course of the sales cycle, the account team may have many questions regarding specific issues pertaining to their customers such as the status of an order shipped, any

outstanding support issues from previous orders, questions regarding billing, et cetera.

And this is often the case: business critical data is not located in their CRM system. It may be located in other silo'ed departmental applications as such. When this customer information which is so critical to the sales cycle is located in the silo'ed, disparate systems located in different departments, the challenge is first to identify where these systems are located.

In this scenario, under the best of circumstances, the account rep will spend quite a bit of time logging in to multiple systems and searching for key data which might not even be accurate due to the fact that it might have been manually entered from application to application, which is a very error prone process.

The sad reality is that in many of these cases the account rep will not even have a license to access these systems to begin with. So if the sales team cannot access the key questions for their customers, this may result in prolonging or even jeopardizing the sales cycle. So the question for the IT becomes, how can this line of business pain -- specifically, the account team not having access to the business critical information located in other systems -- be resolved?

And the answer is for us, WebSphere Cast Iron Cloud Integration, which provides the connectivity to applications throughout the enterprise in order to give the user -- the account team in this case -- real-time, bidirectional information that might otherwise, as I mentioned, be silo'ed or even out of date due to erroneous manual double entry we spoke about.

So, connecting these applications with your CRM investment means you provide a 360-degree customer view for your account team in this example from within a single application -- in this case, salesforce.com CRM, for example -- so you're reducing man hours spent searching for information, reducing the sales cycle, automating and accelerating key business processes; and ultimately, increasing customer satisfaction and retention.

So, by identifying the key business processes, we're using a very robust tool to take that information which might otherwise be silo'ed in departmental applications, as I mentioned. And I'll give you an example of using one of the popular cloud CRM systems salesforce.com. We can see that the power of WebSphere Cast Iron Cloud Integration turbo charges that application, providing the functionality of the sales cloud, the service cloud, custom cloud, or its newest offering, Chatter, and providing real-time feeds to all of

these applications from back office systems throughout the enterprise.

WebSphere Cast Iron Cloud Integration can actually facilitate that dialogue between IT and line of business in order to resolve those specific business pains through connectivity, and we can provide you a few quick examples of our proven success integrating applications which you might find relevant.

And these are our cases where we have a specific business need, a specific business process that was identified by IT, and IT was successfully able to become that hero, become that champion to the line of business. So we can see in a number of organizations we've had to connect their SaaS or cloud applications to various back-end systems or whether those are ERP systems, whether those are HR systems, or even other, we'll say, legacy on-premise CRM systems.

I'd like to highlight the duration of these projects. As we can see, these large organizations, in many cases spanning multiple geographies, were able to accomplish this enterprise application in just days. We should note that once we were able to successfully integrate the initial system for their project, whether that was, say, CRM to ERP, they were then able to leverage WebSphere Cast Iron Cloud Integration to connect other applications.

So, while they may have started off using Cast Iron for a point-to-point integration, they were able to subsequently use it as a platform for additional projects. And given the reusability and template-based architecture we spoke about, they were able to accomplish this rapidly and simply.

So, let's take an excellent example of a partner of ours which identified and subsequently overcame specific connectivity challenges, namely within their CRM to ERP system. This would be, of course, Siemens as a case study.

With that, it is my great privilege to turn this Webinar over to Randy Berger, IT manager for process and development at Siemens. Randy?

BERGER: Thanks, Jaime. I was going to try and start with a little introduction to our company. Siemens ranked 40th last year in the Fortune Global 500 company listing. With revenues of \$104 billion and just over 400,000 employees in 109 countries, we're almost into everything.

But with very few consumer products in our portfolio especially here in the U.S., there's relatively little name recognition. But of the 400,000 employees that we have globally, about 60,000 of them are based here in the U.S.

Now, I work for the IT sector and I work in the energy



sector for IT. And I primarily support the power transmission and distribution divisions there. Siemens Energy mainly sells to utilities and large industrial customers. We provide products and services in all areas from the abstraction of fossil fuels to the generation of electricity in large generation stations to all the equipment and software needed to manage the transmission and delivery of that energy to the consumer.

We are heavily investing now in the development of renewable energy sources as well as smart grid automation including the infrastructure needed to fuel the electric cars of the future.

Now, when I took over our CRM platform back in 2002 -- we started with salesforce.com in 2000, actually; we're one of their tenure companies -- we had less than 100 T&D employees that were using it. But now over the years it has grown and expanded across all of energy so that we have at least some employees in all of our six energy divisions that are using salesforce.com to manage some part of their CRM-related processes. And currently we're just over 1,500 users in salesforce.

But on the back end, the back office side, the ERP side, as Jaime mentioned, Siemens has almost standardized on SAP. However, with that said, we do have a lot of variations of

those installations and not really one common platform. But as you can imagine, having multiple instances does not lend itself to a nice integration strategy.

In 2007, my division, the T&D division, had recently completed a large project in the U.S. to consolidate four legacy ERP systems into one SAP instance. Well, this was good news for us. Since we had been using salesforce.com for over five years then, we had quite a bit of pent-up demand for integration.

I had identified at that time three separate business units that wanted to be able to tie the two systems together. And also, had been aware of Cast Iron out there in the marketplace, and so we brought them in to do a demo to our IT team.

I still remember the day when they came into our conference room and they beamed it up on the wall and made that connection in front of our eyes, and we saw how easy it was to connect the endpoints and to create the program which they call an orchestration.

Well, then it was a simple decision. We went forward with it and started with a very inexpensive footprint, and we used Cast Iron's technical support to help us through that first project. That first project, which was called a proof

of concept, was completed in 14 days.

We then leveraged that work out for two additional projects, but essentially the solution brought SAP order and shipment data like dates, quantities and sales prices back into salesforce.com on a line-by-line basis...line item basis.

We didn't really push for any master customer database synchronization at that time; we were just simply trying to tie the SAP sales order to the salesforce.com opportunity via a key field.

Well, one of the key factors in choosing the Cast Iron solution was that we have a small IT team here and we have very limited development resources. So, we knew upfront any solution that we picked had to be able to be used by business analysts that are on our team.

We knew early on going into it that anything that was co-dependent would be out of the question for our organization. That eliminated selecting any tools that were required doing custom code or even back then most of the traditional integration software tools.

Well, the approach we took was to lease the appliance and under a contract that is aligned with our salesforce.com license contract. And we keep it on site mainly to avoid

some other IT issues that we won't go into here. But it's a philosophy that we've had within...that we use whenever possible that we want to configure and not code, and the solution fit with that approach.

And we used that with our CRM platform and we want to extend that strategy out to this integration platform. Not only that, we really don't want to mess with the ongoing connectivity issues that would come up as the two base platforms evolved -- and that's what Cast Iron does and handles so well.

Well, the results of our first phase of integration projects were that our businesses were drooling. They really began to see quickly how fast we could deploy integration solutions, and they began to experience the benefits of improved accuracy and reduced data entry. And they were basically becoming more efficient in their processes. So, once word got out about what we were doing, the business interest multiplied and they wanted more.

We in IT met our objectives of delivering a cost-effective integration platform that was simple to deploy and easy to extend within our...with using our limited resources. The business got what they expected, and the opportunity to leverage that out to other businesses within our division. They could do that rapidly and with minimal cost.

So, I've had some turnover in my team since those initial days, and now I'm actually using local college interns and co-op students to create and modify the orchestrations. That's literally how easy it is to use. And one of our keys to success is that we always keep the scope narrow on our projects and well defined initially. That way, we can grow and extend from our initial successes. It's very much an iterative approach.

To illustrate that, let me just bring you up to speed on where we are currently with this integration platform strategy. Once we establish the Cast Iron solution as a best practice in our company, we began to expand the footprint from a point-to-point or a one-to-one connection -- that would be salesforce.com to SAP -- to a one-to-many where we connected salesforce to other SAP systems on our IT landscape. And finally, to a many-to-many point application servers. So now, we can connect databases across the business to any other database that we need to.

We have approximately 120 orchestrations running on our production box at this point connecting salesforce.com to other databases and SAP to other databases. Sometimes we just use it extend salesforce.com functionality for workflow or e-mail messaging. It's become a very utilitarian tool for us in the business.

So, instead of what could become a very messy landscape connecting all these things together, it really does make our lives in IT very much easier to manage the more and more applications that keep coming up to us for integration.

In a moment, I'll share with you one more recent project that we did, because I think it illustrates the power of this solution and for our business going forward. Before I do that, let me just wrap up with a couple of take-aways.

We're not in the application development business here at Siemens. We really don't develop or maintain CRM software. We don't want to do that. We don't want to do it for extensions, either.

All of our salesforce.com admins share the work part time, so we have very little overhead on this platform and we want to make sure that our integration strategy was aligned with that. So, that's a key.

The second point is to strive for simplicity. The Cast Iron platform gave us...it was the correct decision for us, because it was demonstrably simply to get up and running quickly and at fairly low entry cost. And again, our motto is "configure, don't code."

And third, you must clearly define the business processes of the user first. What do they need? New ideas will keep coming out of the woodworks, and folks get excited when they see the potential. You just have to be aware of scope creep or pick an easy project for your first one, or at least one with limited scope and then build on it.

We used Cast Iron to help us with the first project. We looked over their shoulder. And that first successful delivery is key. We had visible results in two weeks, and that gave us credibility with the company. And we built on it from there.

And finally, once our internal customers saw how easy this was, they talked. And you know, good news spreads. They'd see things and they'd say, wow, you can do that? We need to do that, too. And so, it was very easy to continue to move forward with more and more of these integrations.

So, to illustrate that, let me just share how this recent project played out. By the way, we define an IT project here at Siemens in our group as anything over 40 hours of IT time. Anything less than that is just captured as support tasks. So, many of our orchestrations that we do are just that: support tasks, not projects.

This one example, during our annual sales meetings, the

division head and the CEO were getting a lot of complaints from our sales agents and reps about not ever getting information from one of our plants on order status. The customer calls the rep, the rep calls the factory, the factory has to investigate. You know how that goes.

Anyway, our CEO challenged the VP to fix it before the next meeting, which, by the way, I just realized our next sales meeting is next week, so it's good that this is in place. But there was a lot of analysis done by the SAP team to determine the dates that were necessary and the factory folks to talk about how they were going to populate those dates in SAP.

And once they determined those dates they were going to use for the actual and the planned milestones in this process, and there is quite an extensive process involving order acknowledgment dates and approval drawing dates being created by the engineers and then sent out to the customer and back from the customer.

So, all these dates were captured in SAP, but when they came to my team, it actually took just three days to create a custom sales order item object in salesforce.com to create the orchestration to tie them together, test it and push it live. And that's literally how fast we respond to these things.



So now we have 13 date fields in salesforce.com that are updated in real time from SAP whenever the factory makes a change to either a planned or an actual date. Well, that's a beautiful thing, because now our sales agents and reps can go into salesforce, run a simple search or a report and see the status of the sales orders that they have access to.

And the really cool part in this was that I had to just go into setup and turn on those fields as Chatter feeds, and now any one of them gets it pushed out to them any time they follow any of those sales orders. So they have an automatic Chatter notice coming out whenever SAP has changed.

So, that makes it possible now going forward to deploy Chatter mobile. And when that happens, then it will be sent to their PDA; or, hopefully in the near future, once the factory is comfortable with the new process and comfortable with the dates that they're putting in there, we can actually make that sales order item object visible in our customer portal.

And then the customer won't need to bother the rep, they can just see it for themselves in real time. Now, that's really cool stuff. It's very exciting to see how integrating one data set can lead to multiple data extensions with very little additional work. So now, that's all I have, and I

will turn it back over to Jaime for a short demo.

D'ANNA: Thank you so much, Randy. I can't tell you how compelling that was. Kind of quick call-outs that I wanted to mention. I really liked what you talked about, the visibility. And obviously in your case scenario that visibility translated to the CEO taking notice of it and saying, well, I'm challenging business and IT to resolve this problem -- I love that.

And I'm glad that Cast Iron as a platform -- the WebSphere Cast Iron Cloud Integration -- provides that repeatability so that you can repeat that successful integration that you've done in your primary project and repeat that across various environments and various departments.

One thing I'd like to repeat, Randy, is something that somebody at a previous Webinar, ShoreTel, said. He said, be careful of what you say when you tell the CEO, yes, we can do that; we just did it in a day. So he had a similar situation and he basically socialized the success of his project with Cast Iron saying, yes, we were able to do an integration in a day. So, the CEO talked to the CTO and the CIO and said, well, good. Then you guys should be able to do this project in a day, too. So, he had a good laugh on that.

So anyway, getting back to this. With that as a background, I'd like to talk about the current challenges in application integration specifically from a cloud CRM to an on-premise ERP system. And I'd like to, as Randy said, transition to a live demonstration of our product and hopefully give you a real case, real live scenario in real time that mirrors the challenges that you may be facing.

And the goal here is to reiterate the value of real-time bidirectional integration accomplished through a simplified user-friendly interface with the ability to reuse this information for future projects.

So, we'll accomplish all of this by showing how easy it is to configure, run and manage an integration project by using the simplified WebSphere Cast Iron Cloud Integration interface. So to start off, I'd like to set the stage. We're talking about three specific applications; one application you'll probably know very well, which is salesforce.com CRM.

The second application we're going to be addressing is a homegrown ERP system based on SQL. And once again, as to Randy's scenario, this could be SAP, it could be any ERP system that you have on premise. And of course, the third application is Cast Iron.

So, to start off, what I'd like to go through is how easy it is to create, modify and run an integration. And what I can do when I create an integration is I can go in and once again, based on the reusability of the TIPS -- or, Template Integration Processes -- that Cast Iron gives you access to, I can search on some of our most common influences you see right here.

I'm going to choose salesforce.com, choose "search," and what that does is it will then allow me to base my project off of successful integration projects and best practices which have already taken place.

Now, to make things a little bit simpler, I'm going to go ahead and modify an existing project. And what this will allow me to do as an IT person is once again leverage best practices of successful integration projects.

Now, I'm going to go ahead and pick a specific business process and open this in our Cast Iron Studio. Now, while this is opening, I'd like to mention that not all of us have chosen the same career path in life; not all of us have chosen to be rocket scientists, or brain surgeons, or expert tax accountants.

But in the case of the latter, we can all get the expertise of expert tax accountants by using a very user-friendly

interface that we find in an application such as TurboTax. Now, this TurboTax wizard allows us to once again get the best practices and expertise of an expert tax accountant. I would not recommend this wizard-based environment for brain surgery, so if your doctor offers that up to you I would run away screaming.

But we are going to use this wizard-based approach to do some very complex integration. And let's start off right here, as we see on the lefthand side, a summary of what we're going to accomplish. On the righthand side, this is our actual business logic that we're trying to accomplish.

So, let's put ourselves in the hat of a line of business account rep once again as we saw in that scenario in the PowerPoint. The account rep has one...well, actually, there's many points of entry into many applications, but we're trying to say, you know what?

We only want to give you all of that information in one single front office application such as salesforce.com, so you won't have to log into multiple systems; you'll just find all the relevant information available to you in one system. You log in once, get everything you need, and you have a 360-degree view of your customers.

In order to do that, what we're going to do is we have our

homegrown, SQL-based on-premise ERP system. What we're going to do is extract that information, populate that into our salesforce.com application CRM system. So, from salesforce.com they'll be able to get the benefit of the information located in the ERP system.

However, our business rules say that once the customer data is extracted if the phone number field equals blank, then it will then terminate the process. So, it will not import into salesforce.com. So that's our business logic we have running here.

Let's go ahead and click next. The next step in our workflow or in our wizard-based step-by-step process is that we're just going to log in to the system. So this is our homegrown ERP system, once again based off of SQL server off on-premise. I've already authenticated, so I know that works.

The next step is to test the connectivity to salesforce.com, so in this case what I can do is I can also go ahead and change the authentication or I can actually test the connection. And I'm just going to do that right now. We are successfully connected to salesforce.com. Once again, we have a native connector to that application so we are able to get the benefit of the API information.

Let's go ahead and click next. So here, we're connecting at the database level. This is just an fyi for all the IT people on the phone. We're actually extracting the information from the data tables. We see right here these are...this is the schema we're looking at, and these are the available data fields available to us in that schema.

Now, we're just clicking next, and now we're looking at the information from salesforce.com once again. Here we're looking at the API level, and just as a point of best practices -- and Randy can also confirm this -- we prefer, if I'm working on the IT side, to connect to salesforce or connect to any application at the API level.

Why? Because the business logic and business rules are many times already found in that API, so it saves us a lot of time and work. But it's once again, this is the knowledge set that Cast Iron gives you coming into this project, because once again, we give you the functionality here to choose from the available objects in salesforce.com's API and we're always looking at the latest and greatest API.

And one other thing I want to point out right here is we see underscore C, this means it's a custom object that's been created. So, we can see custom objects as well as the standard objects available in the salesforce.com API, and we're always looking at the most recent and latest and

greatest.

So, we've already essentially identified our two points of connectivity. We're looking at the specific objects that are supposed to map with one another, and we can see that right out of the box by using a TIP -- or, Template Integration Process -- I'm pretty much 70 percent of the way there.

We know that customer equals customer, name equals name from our ERP to our CRM. However, there are some specific fields that have not been reconciled; namely, in our ERP system we see we have many fields for address: 1, 2, 3, 4; whereas in salesforce that would map to billing street.

So once again, in the IT department, I have through WebSphere Cast Iron Cloud Integration, the ability to do some very complex functionality without writing a single line of code. Why? I am getting the benefit of all of these functions in a drop and drag scenario. So I can take, for instance, the concatenate function, drop that right here, and map these specific objects -- or fields, rather, in this case -- from our ERP system to one field in salesforce.com.

So, once again, very complex functionality written into this particular interface in a drop and drag environment without



requiring a single line of code. What that means and translates to is the fact that I do not need to be an integration specialist in order to take advantage of this skill set and functionality; it's already there in the application.

So rather than me being, quote-unquote, an integration expert or integration specialist in my title, I can be a junior level IT admin, somebody, as Randy mentioned, maybe interning from college looking for that first point of entry or foray into the IT world. Very, very complex functionality available to me.

Go ahead and click next. Now, we're nearing the last steps of our workflow right here. This is basically once again the business rules written in here saying that where the variable equals blank -- in this case, the variable is the telephone field equals blank -- we're going to terminate.

I can go ahead and add to this as well, and I'm going to expand on this business rule and say, where the phone number is less than seven, because these days we have at least seven digits in our phone; then if we're calling overseas of course we've got upwards towards 28, right?

So any time where the phone was left blank or it's less than seven digits, we're going to terminate. So, go ahead and

add that, click next. Our pan ultimate step is the fact that we just have to design or deem wherever we want to publish this.

Now, we can publish this, as I mentioned, in three different options on a Cast Iron appliance which sits within your firewall; a virtual instance of that appliance; or, completely in the Cast Iron multi-tenant cloud service. And that's as easy as that. We are done with our very complex integration; now let's see it in action.

So we've gone ahead and looked at what it's like in a day in the life of a person who's actually doing the integration; now let's transition into what it's like for the actual business person on the business side.

So, let's say that on the business side, I have decided to create a new customer record. I am in this case not the sales team, but rather let's say I am in shipping and receiving.

I've just learned that a customer in honor of Randy, let's call, put in an address, city. Well, of course, he's in Mountainview, North Carolina, Randy, you just didn't know that. Okay.

There, we've gone ahead and entered a customer record.

Let's put a zip code right there. And now, I click add. So if you'll notice that customer 135, do inquire, actually I think it's 136. Let's do inquire once again. So let's answer this one more time. There we go. And we'll just keep all this the same. Okay, see what we come up with, 37, there we go. All right.

So we've created a customer record right here in our ERP system. Myself as the shipping/receiving. Now, what we're going to do is transition to another line of business, and this is the actual account executive. So the account executive wants to find out all of the people that have been modified today, and I don't see Go Tar Hills, and we just created that in our ERP.

Now, if the integration were working, we would have that in our salesforce populated right here, and as an SE at this point I would be tap dancing and saying, why, that's actually really a functionality, and to be honest, it really is...I'm joking with you.

I guess, what did we forget when we entered in the information Go Tar Hills? I specifically deleted it, if you caught it. It was the telephone number. So, if I went ahead and added this telephone number as per our business rules...

Let's go ahead and click change, inquire, make sure it took.

Great. Now we have a phone number there, and actually should be Tar Hills, change, inquire, there we go. Now if I click refresh from all in salesforce all my accounts modified today, there we go. There's one misspelling, which we'll delete that one, and then we've got the correct spelling right here. Go Tar Hills, all right.

Now, let's go ahead and look into this record. Once we've seen the record is created, I as a salesperson get the benefit of all of this information located in a disparate system on premise which is the ERP system, right?

Not only is this information up to date, it also is referenced by the customer ID. So going back here, customer ID 137, customer ID 137. So, if I needed to speak with, for instance, the shipping person who's only looking in their ERP system, I could say, please take a look at our record 137, they'll know what I'm talking about. But I as a salesperson don't need to leave any application at this point; I can get all of the relevant data I need from my CRM system.

So as an IT executive now, let's think about what the benefit of this is. I'm allowing that account rep real-time updated information in my CRM system. We saw -- and this was not planned -- there was a mistake in my ERP system I

corrected several times, and that was instantly corrected here in my CRM system.

So, what does that do? It makes sure that I as a sales rep, as an account exec, looking at my CRM system, only get the up to date actual relevant data, nothing erroneous. So, it's not manually entered twice; it's manually entered once, it's corrected once in whatever system, and I get the benefit of seeing that. I don't have to search across systems, saving me time that way. I don't have to log into multiple systems, saving me time that way.

I get the relevant actual, factual data saving me talking to the customer and say, oh, I see you're in Mountainview. No, oh, I meant to say...that type of thing. So we're increasing that customer satisfaction and customer retention dilemma. That's really what I wanted to show with regard to the WebSphere Cast Iron Cloud Integration.

So in sum, it maps completely to your cloud strategies. As Randy mentioned, there is a complete alignment to what you're trying to do as far as what your integration needs are. We connect in days, we provide very flexible deployment options, and it's a very simplified interface as you've just seen.

And with that, I would like to turn it over to some Q&A. I

see there are a number of questions in our queue at this moment. And I believe some of them are directed to both Randy and myself, so let me just scroll here, okay. This is, there's a qualifier right underneath it, it says it's to Randy, so I'm just going to read it, Randy. And this is going to be for you.

Do you run everything on one production environment? What is that environment? Is it on premise? SaaS -- in this case, cloud? Or virtual? Is it a multi appliance environment with fail overs?

BERGER: Okay, and I can easily answer that. I partially answered that in my talk. Can you hear me okay?

D'ANNA: Absolutely.

BERGER: We have a production box and we have a QA box which acts as our fail over. Again, we have a fairly small footprint, so everything runs in production, we test it in our QA and then deploy it in production. And the environment is, it's not a virtual appliance, it's an actual appliance that we lease from Cast Iron.

D'ANNA: Excellent. So the next question is I believe to me. I understand the framework in technology, what is the pricing structure? Is this for large corporations, or

is this directed to the mid tier market?

So, let me give you a little bit of a history. Cast Iron as a company was very, very focused on enterprise and mid market. Some of you in attendance may have even seen us at a number of mid market CIO forums, mid market focused trade shows.

That focus has not been lost. Obviously IBM acquiring us has given us the benefit of a vast amount of resources and infrastructure to approach enterprise customers, and to be honest, Siemens is a case in point.

If an enterprise customer with kind of...and no disrespect, Randy, but with kind of like a mid market division that we're dealing with, would that be fair?

BERGER: Yes, absolutely. We don't...we're small.

D'ANNA: [LAUGHTER] So that having been said, our pricing structure follows suit, meaning we have a very flexible pricing structure to fit pretty much any organization. We price per endpoint, meaning if you have a one-to-one connectivity need you're trying to connect that salesforce.com to that SAP or ERP. We price accordingly.

If you have one to many, we have packages, maybe you have

five plus endpoints that you want to connect. We have packages that we can supply you with there. And once again, very flexible, just depending on the endpoints that you're looking at. We can provide a one-off pricing, meaning a complete purchase pricing. Or, we can provide subscription pricing as well.

If you have any particular questions, please just e-mail us at the end and we'd love to go ahead and respond in a little bit more detail. Okay, so next question, I believe this is to Randy. What skill sets were most useful to perform the integration?

BERGER: Well, I think from your demonstration you can see that anybody that understands the logic of rules can basically put one of these out there. So there's no special skill set required.

Now, when it comes to how fast and how complex you go, obviously the more development and coding background you have, the more experience you have, the faster these are going to go and the less debugging and trial and error you're going to have.

So these guys that are coming out of school with computer science backgrounds and some coding background, they're going to be much more agile in the tool, but a business



analyst that we use regularly can just as easily go in there and do it. So it varies, depending on what your requirements are.

There was another question, I think, I'll answer just off the top. The frequency of how we run them -- sometimes we run in batch mode...well, batch mode? The orchestration we'll run once during the night and clean up a lot of data, or it will run whenever a trigger comes out of an idoc out of SAP, or it can run off a trigger in salesforce.

So it can run real time off triggers, it can run every two minutes. We can look and do a polling every five minutes, or we can run it once a night. It's really all programmable.

D'ANNA:           Excellent, and that's our pat answer as well when we're asked, what is the scheduling? We say, well, you can do it in real time or batch. So, perfect case in point.

Here's another one for you, Randy, because I know the answer, but you can give it just as well. Can you go the opposite direction? For example, from salesforce to ERP?

BERGER:           Yes. Obviously you can. In our case, we have not yet deployed an orchestration that pushes data into our ERP system, but you can. And we're looking at a project

right now to do that.

D'ANNA:           Excellent.   Excellent.

Okay, this one I believe is to us. Do you have customers using this tool as a data migration tool from legacy systems and/or databases to new solutions and platforms? And the answer is absolutely. I really invite you to go to our Web site and look at the existing Webinars we have done previously to this one.

One of the most relevant ones would be hiSoft's, that was which we did in conjunction with hiSoft, a customer of ours who helped us out with a deployment, with a Webinar, that we brought a customer in called Corporate Executive Board, CEB. And they did a legacy CRM system to a cloud CRM system.

We also very recently as I mentioned in this Webinar did one with Shoretel, with Dean Floyd from Shoretel who once again did a migration from a legacy CRM system on premise to, we'll say, a newer technology for cloud CRM. So the answer to you is absolutely. This is one platform, as I mentioned, for all types of integration.

And I always like to think of, if you want to think of an acronym, MIC, M-I-C. So, Migration, Integration or Consolidation. You can migrate your data from one source to another, from an older source to a newer source if that's

the way you want to go as per your IT strategy.

You can integrate them for bidirectional integration -- meaning, you're not turning one off; you're still using both of them and they're both talking to each other bidirectionally. Or, you can consolidate. So, back to Randy's example of taking all of those existing data structures, those many points of data in your enterprise, consolidating them and making sure they're all synching and all speaking in tandem. So I hope that answers that question.

You already answered the next one. Okay, here's another question. I liked the real-time demo; now, let's take that to another level. Let's say when a user in salesforce.com clicks on an account, how can we retrieve orders for that salesforce.com account from, let's say, SAP in real time while viewing the accounts page?

Okay, so that would be what we would call a mashup, and I mentioned that briefly; we didn't really demonstrate it here. But what you'd essentially be doing is taking all those custom fields...or, not even custom fields; we'll just say relevant fields, from SAP, populating that from within a frame in your salesforce.com environment so you could just create another tab which will then either automatically run those reports every time the tab is accessed or how ever you

want to lay it out.

You can put several specific custom objects there. You click on them, runs a report, or actually you're just basically viewing the information. The end user wouldn't even see a report being run; it would just be, as I said, just actually populated.

So that is our...we're drawing unfortunately to a close here as we're approaching the hour. I understand there are quite a few questions in queue. We will be reaching out to you via e-mail to make sure we answer those for you, but in the meantime I would like to thank you very, very heartily for participating in this Webinar.

And Randy, a real, real big bear hug to you. It was great seeing you at salesforce; I loved speaking to you albeit virtually. And thank you so much for participating in this Webinar with us.

BERGER: Great. Thanks, Jaime.

[END OF SEGMENT]