



THE MODERN INTEGRATOR'S PLAYBOOK

GAINING INTEGRATION CONTROL



It doesn't matter what industry you are in, or how many customers you have, enterprises must feel empowered by the amount of control they have to deliver business outcomes. Technology solutions and vendor partnerships play a critical role in creating different levels of control and are directly proportional to the confidence an organization has in its perceived ability to deliver desired results.

Specifically, one of the fundamental pillars of a successful integration strategy revolves around the concept of integration control. For example, having control over the strategy and execution of integration-related activities means enterprises are able to feel confident in delivering integrations to support business requirements – whether those are coming from customers, trading partners, or internal growth initiatives. For one reason or another, this is something that organizations have struggled with for years, presenting major challenges and creating pent-up frustration.

A confident integration strategy requires a certain level of control – and to get it, you need a playbook. Follow the strategies (“plays”) outlined below and your potential for success is unlimited, no matter what integration use case comes your way.



WHAT IS INTEGRATION CONTROL?

Integration control is the concept of empowering your organization with the flexibility, agility, and visibility to efficiently execute critical B2B transactions, resulting in an acceleration of business outcome delivery.

PLAY #1

ENSURE END-TO-END INTEGRATION,
THEN AUTOMATE IT





When we use the term ‘end-to-end integration,’ what exactly do we mean? There’s an answer, but it might not be the one you’re expecting.

End-to-end integration is ensuring your data (presumably from a B2B transaction) arrives at its intended destination, typically an enterprise system like an ERP or file server. Having end-to-end integration is critical for completing any business process, such as order-to-cash or load-tender-to-invoice.

Often, enterprises have piece-meal technologies that create gaps across the multiple steps that are required for achieving an end-to-end integration. The result is manual intervention to complete a business process, such as “swivel chair” integration – causing a lack of control over resource efficiency, customer satisfaction and service, and error resolution.

End-to-end integration is all the more important in eCommerce transactions because consumers have a high bar for eCommerce fulfillment and seamless shopping experiences.

To meet the demands of the market, organizations must ensure manual steps or gaps in business process orchestration do not impede the ability to deliver products on-time.



AUTOMATION A TOP PRIORITY

80% of companies surveyed said integration automation is their top objective for delivering business improvements

– The 2020 State of Ecosystem and Application Integration Report

This issue particularly becomes more transparent because eCommerce sales typically create a ripple effect throughout the organization due to an increase in volumes and smaller order sizes – completely disrupting previous business operations that were built to support batch transactions coming from traditional methods like EDI or file-based transfers.

Organizations need to increase operations control by introducing end-to-end integrations and automating key business processes.

Those who embrace modernizing their integration technology will have better control over:

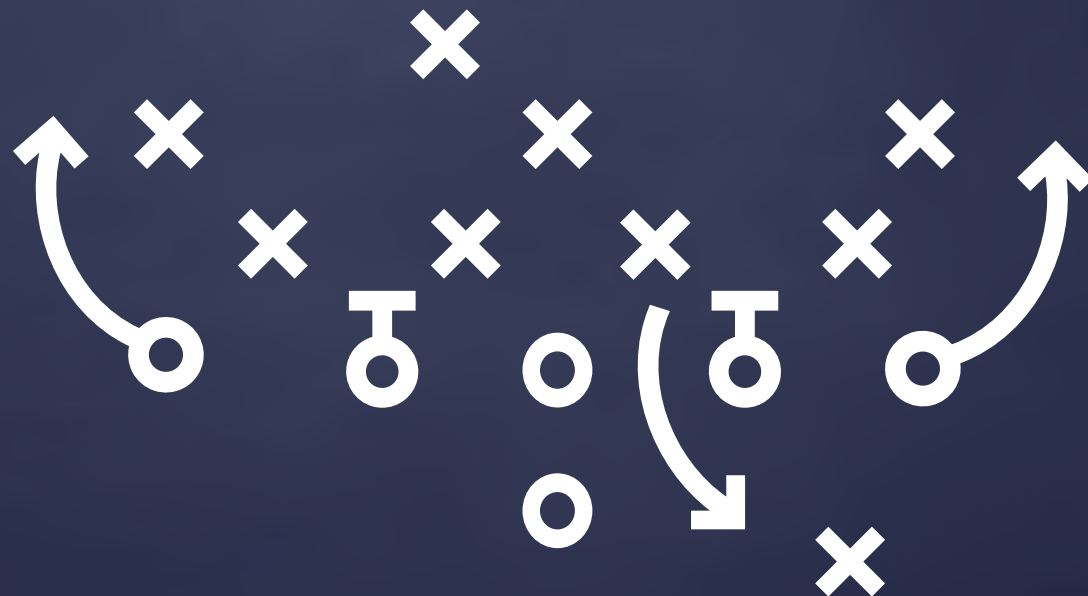
- Partner and customer service level agreements (SLAs)
- Customer experiences
- Management of critical resources and personnel
- Issue and error resolution

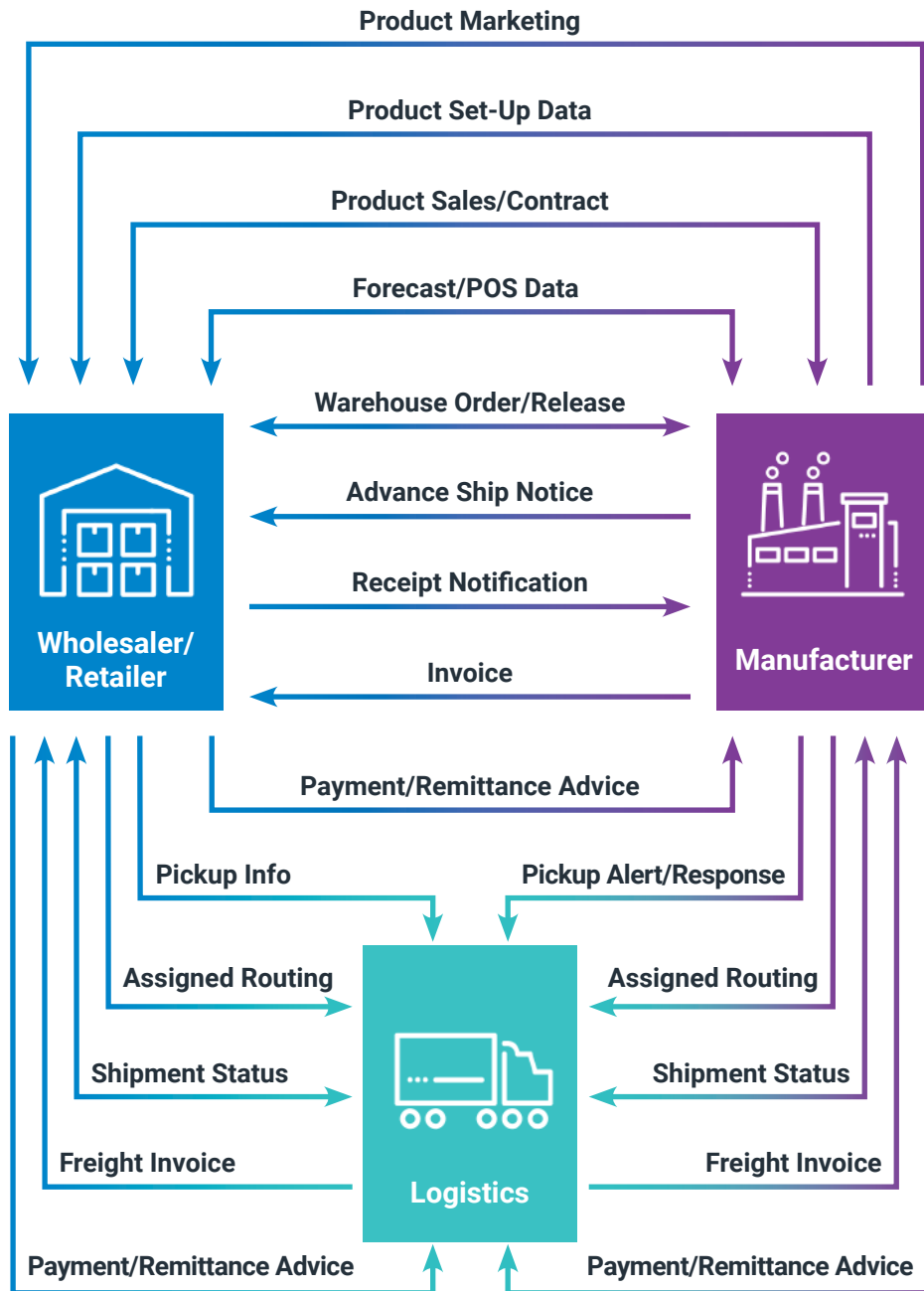
As consumer expectations continue to increase, the ecosystem that drives the consumer experience must increase control over various integration operations to keep up with demands. The stakes are high and those who do not leverage end-to-end integrations and automation will be putting their business at risk.



PLAY #2

REDUCE INTEGRATION
VISIBILITY GAPS





Companies must maintain a high level of visibility throughout a B2B transaction's lifecycle – from inception to completion. Integration visibility provides deeper business insights that can be utilized to optimize operational performance, identify errors or bottlenecks, and make better business decisions.

A typical order-to-invoice process has several steps for successful completion from order retrieval and fulfillment to sending shipping notices and invoicing. A single transaction may hop between several systems such as an integration platform, ERP, and WMS.

Often, organizations don't have real-time visibility to optimize their business. Common visibility gaps include:

- Knowing if an order made it into an ERP system
- Identifying whether a file was transformed correctly
- Acknowledgment of an order being fulfilled by a 3PL
- Visibility into EDI & API-based transactions in one place
- Partner or customer volume trends
- Overall health of transactions
- Status of issues in resolution queue



A national distribution and fulfillment company based in the Midwest is one example of how visibility is vital in daily operations. Their IT team needed to manually convert 500 documents a day. However, limited visibility into the nearly 1,000 file transfers happening daily meant the distributor couldn't efficiently regulate, log, and track its various FTP, SFTP, and AS2 transactions.

The lack of visibility meant the company often didn't even realize when and why a transfer failed besides the fact that it simply never showed up. It got so bad that its partners would often have to contact them to alert the company to a failed inbound transfer. The errors cost the company negligence fees in the form of \$100 per error, per file, which really added up.

Alternatively, having real-time visibility into every step of a transaction gives organizations control over:

- The customer experience
- Meeting SLAs
- Keeping customer and partner promises
- How long it takes to resolve errors
- Customer communications and notifications

Ultimately, reducing visibility gaps will deliver immediate intelligence to optimize productivity and operational efficiency of any organization.



PLAY #3

GIVE STAKEHOLDERS ACCESS TO
CRITICAL INTEGRATION INFORMATION





Sometimes the most valuable part of control is not having it all. Take information for example. When you have a limited group of individuals controlling access to information, it can put an organization at a significant disadvantage. The proper information does not get to the right people or simply gets delayed due to bottlenecks related to permissions, poor user interfaces, or disparate data.

Imagine not having to limit or specify who has access to critical integration information, helping you improve your organization's performance.

By providing role-based dashboards and consolidated insights, business and technical users alike can create customized views into the health of all transactions happening across your ecosystem. Whether one is looking for high-level trading partner scorecards, eCommerce transaction trends, or specific details of a B2B interaction, giving all team members access control to integrated end-to-end visibility can create a competitive advantage through improved decision making.



Integration Control is About Empowering Your Entire Organization with Real-Time Integration Visibility:

Technical and IT teams on legacy systems have limited visibility capabilities that simply don't offer the same level of flexibility that a modern integration platform does. Each of the different members in an organization will gain the following levels of visibility when its organization embraces modern integration:



TECHNICAL / IT TEAMS

End-to-end integration visibility with real-time insights and actions for timely decision-making; Connect and integrate to any cloud or on-premise system; Visibility for every B2B transaction; Access to latest protocols, connectors, and templates to reduce time to market for new integration requirements



CUSTOMER SERVICE

Complete web-based experience with partner scorecards, end-to-end visibility and detailed transaction reports to exceed all customer satisfaction goals; Publish or share dashboards with partners and internal stakeholders



OPERATIONS

Intuitive user interface to quickly identify transaction errors and ensure SLAs; Quickly resolve daily issues with "single-click" reprocessing of transactions



FULFILLMENT

Role-based access; Optimize delivery by processing orders, ensuring inventory balance, and maintaining strong relationships with logistics partners



BUSINESS MANAGERS

Role-based access; Identify critical customer trends, ensure business SLAs are met, and gain visibility into the performance of revenue channels or specific trading partners



EXECUTIVES

Role-based access; On-demand customized views into the integrations that drive business, detailed reports, scorecards, and business snapshots

PLAY #4

CHOOSE HOW YOU EXECUTE DAILY
OPERATIONAL TASKS





When it comes to integration, having control over how tasks are completed, who is responsible for what, and deadline completion is invaluable for an organization.

For example, if you invest in an integration strategy where your vendor provides the options for both self-service integration (do it yourself) and turn-key managed services (outsource to an expert), you can control who is responsible for completing tasks – giving you more flexibility and agility than you have with a singular approach.

Notice the use of “and” in the previous sentence and not “or.” For instance, you may choose to focus on executing tasks related to your most strategic (i.e., most valuable) trading partners, while outsourcing day-to-day operational tasks like a small mapping update to a services team.

Having both self-service and managed services options through a single technology vendor or partner enables you to have the control you need to achieve your business objectives on-time and under budget.

This play is designed around leveraging self-service integration, managed services integration, as well as a blend of both to drive organizational agility and control.

Self-service is really about empowering the end user to make changes directly, because allowing for real-time flexibility enables them to maintain greater agility across their business infrastructure as business needs and customer expectations change.

On the other side, when discussing managed services, the difference is you get a provider with B2B transactions, expertise, and support to ensure your integration delivers the results you need. Managed services eliminates complexities, staffing shortages, and any skillset gaps you might get from a self-service-only approach.

The final option is a combination of self-service and managed service to provide a strategic blend of the right balance, between knowing your specific needs and optimizing control. This is the most modern approach to integration and gives organizations the best of both worlds to complement existing organizational skill sets and accelerate time-to-market.

The benefits gained from utilizing a blend of self-service and managed services are countless, from an easier to follow overall business strategy, to staffing and technology considerations. With a blended approach, you can keep some level of in-house operations for integrations. For instance, you can handle all of your Walmart transactions yourself, rather than relying on a third-party.

No two organizations are the same. There is no magical “one-size fits all” strategy that works for everyone, no matter if your company is in manufacturing, logistics, or wholesale/distribution.

In terms of integration technology maturity, every organization needs to look forward and scale up. When changes appear on the horizon, such as changes to the enterprise application environment, retiring staff, or other events that impact your integration needs, having an integration strategy that best suits your organization’s business objectives is vital.

Whether that is a complete managed service, building out integrations in-house, or establishing a blended approach to integration, is entirely up to you.



PLAY #5

CREATE SUSTAINABLE
STAFFING STRATEGIES





Integration technology is the glue that holds together an organization's revenue-generating business processes within an ecosystem. But we all know technology is only one piece of the puzzle. The right skill sets need to be available at the right time in order to reap the benefits of a robust integration platform.

When an enterprise is lacking skill sets in-house or enough people on the IT team, even the best integration technology won't get the job done. Organizations need control over their resources to handle the fluctuations in integration workloads.

The challenge is no organization has resources sitting idly by. Once a resource frees up, they are immediately deployed onto the next thing. So, what should companies do? Say "no" to business? Pick and choose initiatives? Prioritize based on impact? The answer is likely, "all of the above" depending on the situation.

The better approach is to have more control over your resourcing strategy to execute in-house or through a managed services team. Companies can choose who does the work based on priorities, skills, employee availability, and how critical it is to business. No more saying "no." No more choosing what gets done and what does not. And no more worry if a skilled resource is unavailable. A blended approach of in-house and managed services means enterprises don't have to compromise; the control is theirs.



IN-HOUSE VS. MANAGED SERVICES

Is one better than the other? Not necessarily. It all depends on your internal resource capabilities and what's important to serving the members of your business.

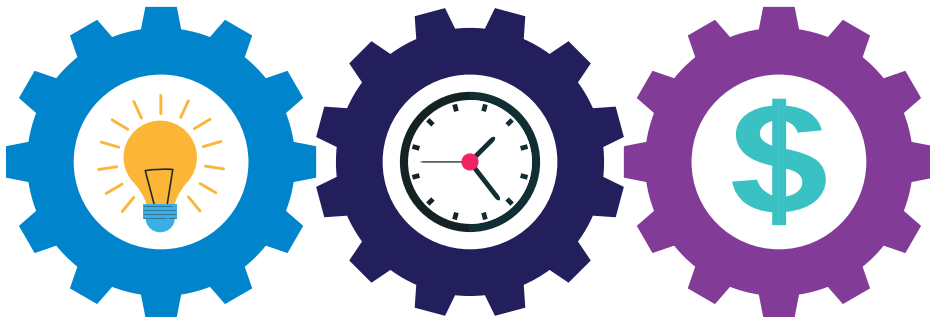
→ [Read the Blog](#)

Capitalize Through Improved Visibility and Control

1. Ensure End-to-End Integration, Then Automate It
2. Reduce Integration Visibility Gaps
3. Give Stakeholders Access to Critical Integration Information
4. Choose How You Execute Daily Operational Tasks
5. Create Sustainable Staffing Strategies

Our hope is that this Playbook helps you discover and create business value as your digital transformation continues. Even if you have a complex in-house environment, and so do the members of your business ecosystem, that doesn't have to hinder you from success. These five plays have been proven to work, time and time, again by companies of varying sizes and industries.

Once you embrace modern integration technology, you will be able to reduce visibility gaps, maintain successful levels of end-to-end integration, and utilize a blend of self-service and managed services to make quicker, better decisions for your business.



CLEO INTEGRATION CLOUD

Cleo Integration Cloud (CIC) is a cloud-based integration platform, purpose-built to design, build, operate and optimize critical ecosystem integration processes. The CIC platform brings end-to-end integration visibility across API, EDI and non-EDI integrations that gives technical and business users the confidence to rapidly onboard trading partners, enable integration between applications, and accelerate revenue-generating business processes. On the platform, businesses have the choice of self-service, managed services, or a blended approach – ensuring complete flexibility and control over their B2B integration strategy.

CLEO

Cleo is an ecosystem integration software company focused on business outcomes, ensuring each customer's potential is realized by delivering solutions that make it easy to discover and create value through the movement and integration of B2B enterprise data. Cleo gives customers strategic, "outside-in" visibility into the critical end-to-end business flows happening across their ecosystems of partners and customers, marketplaces, and internal cloud and on-premise applications. Our solutions empower teams to drive business agility, accelerate onboarding, facilitate modernization of key business processes, and capture new revenue streams by reimagining and remastering their digital ecosystem through robust application, B2B, and data integration technologies.



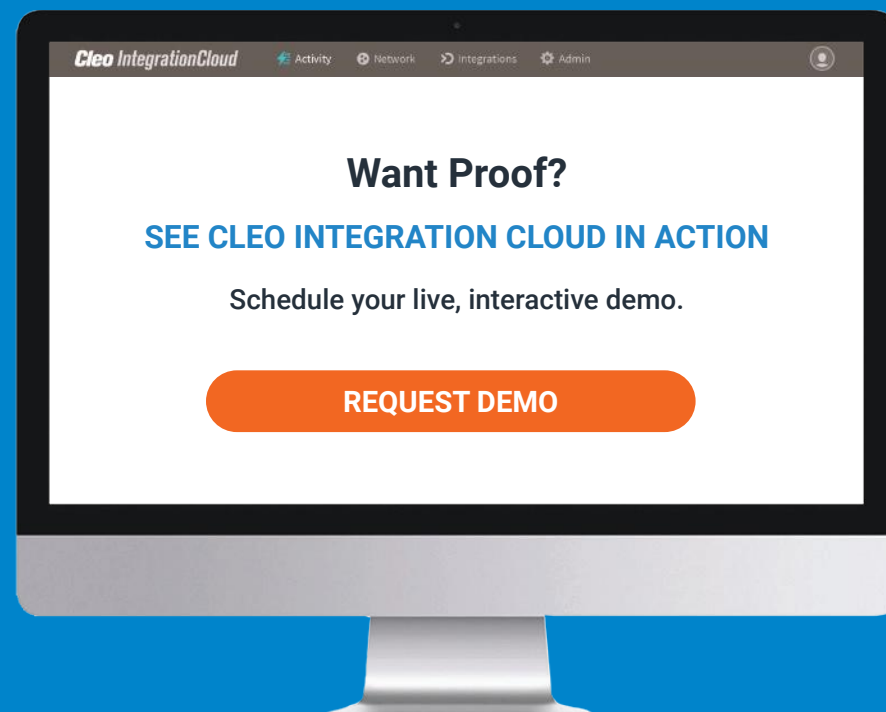
Our Users Love Us.

Recognized "Leader" in iPaaS and EDI categories on G2 Crowd for the past 11 quarters.

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Cleo Integration Cloud™

- ✓ 95% Reduction in Manual Processes
- ✓ 4x Faster EDI Onboarding
- ✓ 10x Solution ROI Through Cost Savings
- ✓ Leverage Breadth of Application Connectors



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