

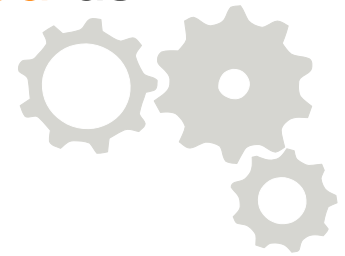
Integrating the core silos – CRM and IBM Connections, leveraging existing IBM Notes installations

Corinna Schmeykal
Riva CRM Integration

Administration & Deployment

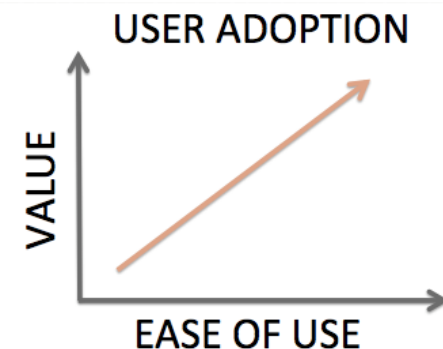
What does data integration mean?

Data integration is a process in which **heterogeneous data is retrieved and combined** as an incorporated form and structure.



Automating processes and using technology solutions to transport data will allow you to focus on adding value to the customer interactions. The customer-facing staff should be able to focus on the customer and not the system.

User Adoption is key here!



We're all humans

- Resistance to change is a given in all CRM deployment
- When that resistance fails to be quickly and properly addressed, and spreads from a few challengers to defiance – the ROI of the CRM is at risk
- Data integration **ensures CRM adoption**



The core silos – CRM and Email Integration

Deploying a CRM system will **NOT**, by itself, improve sales and drive customer retention. Any CRM solution is simply an enabler to achieve known business goals; improved processes and policies will deliver the results.

CRM is a high-growth market (\$36B in 2017)

"You can't do CRM without integration."

"CRM is a journey and not a destination."



transparent | bi-directional | mobile | cloud |
customized

Common Solutions for IBM Notes & Domino

What is on the market?

- Out of the box solutions are mainly **widgets (plugins)** who rely on the end user to install and manage.
- This consumes computational and network resources and also demand considerable **time effort** to support all mailboxes.
- There are solutions that require **modifications on the mail template**, which can potentially generate many issues.
- **Lack of flexibility** to support Notes clients who migrated to SmartCloud and work primarily with web apps, such as Verse and iNotes.



Integration Challenges



IBM Notes
 IBM SmartCloud
 IBM iNotes & Verse
 IBM Notes for Mac
 IBM Notes for Citrix
 IBM Notes Traveler
 Mobile Devices like iPad,
 iPhone, Android, BlackBerry
 & all other smart phones &
 tablets that support
 ActiveSync

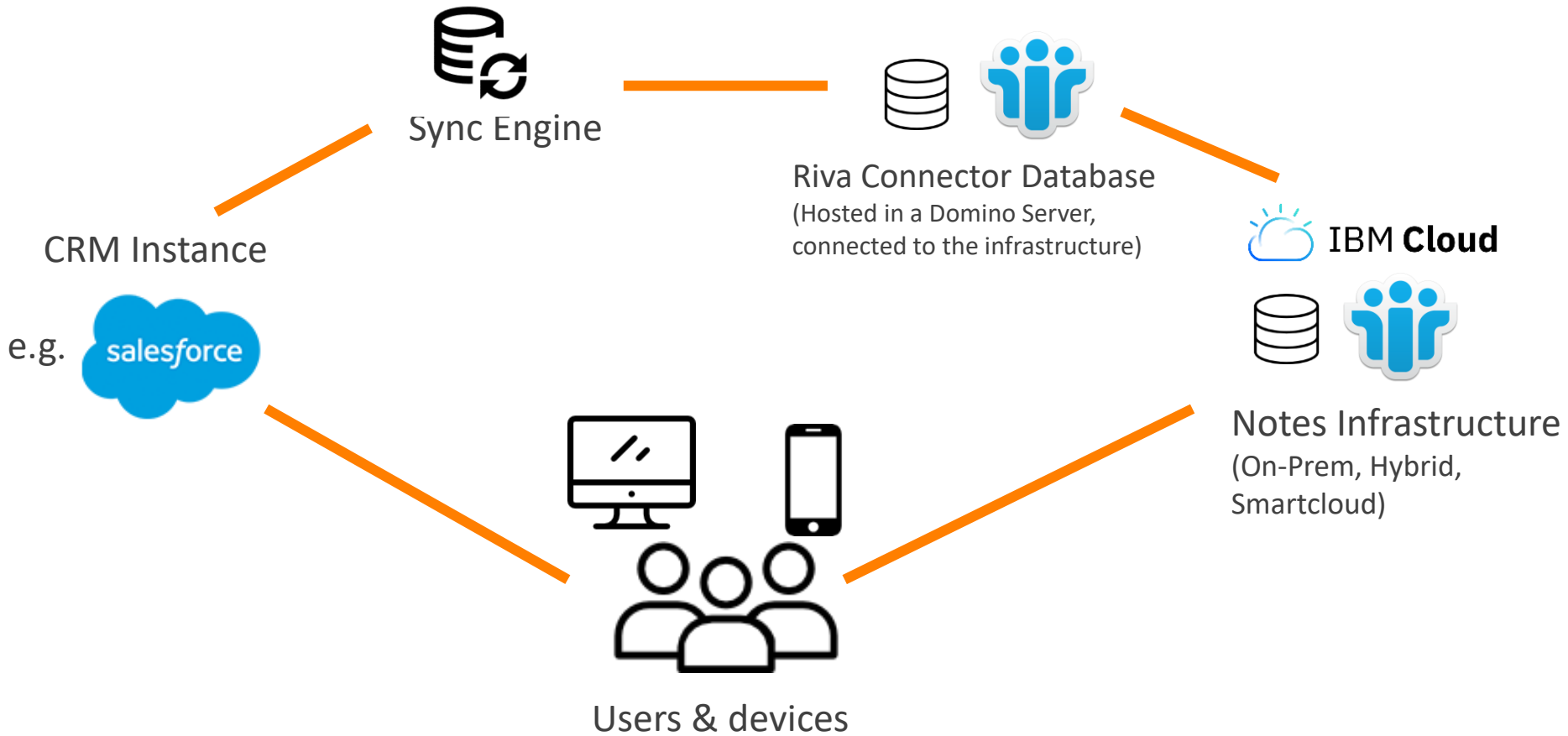
Hybrid & Multi-system Environments
 Citrix and any virtual environment
 Cross-platform, BYOD
 Full support for data encryption, e.g CipherCloud

IT department's wishlist

- Synchronization of CRM data directly to SmartCloud and Domino at the **server level**.
- **No plugins** to install – and no changes in the mail template.
- **Secure** system architecture – the **communication** goes through native **NRPC** (Notes Remote Procedure Call).
- Data is **consistently** synced **independent** of the mail client used – Traveler, Verse, iNotes or IBM Notes Client + mobile device support.
- The synchronization **does not rely** on the **end user** action.



Deployment Overview - Example



Deployment Route

- Since Domino does not have an API exposing the web services to mail files, for applications to use, a solution like e.g. Riva Connector can be leveraged.
- It consists in a database that needs be hosted in a Domino server connected to the current Infrastructure which will provide the **SOAP services** to e.g. Riva.
- Through the connector, the application is able to access the users mail files **using the Domino Directory Database – names.nsf**.
- All **security is managed in Notes** native environment using ACL, Ids and server configuration document.

Deployment: On-Premise vs. Cloud

On-Premise

- Installed in customer's data center (physical/virtualized)
- Easy to manage different groups of sync requirements & system environments
- Highly scalable & flexibly
- Requires on-site technical expertise, IT staff, and hardware to install, configure, and manage the server and policies.

Cloud

- No server installation, management or maintenance required
- Synchronization as a Service
- Scalable on-demand cloud infrastructure
- Single- & Multitenant maintenance
- Ensure GDPR compliance

Customer Success Story



Challenge:

Integration of Microsoft Dynamics CRM and IBM Notes @ Fonds de sol.

Requirements:

- Robust & safe server-side solution
- Highest security
- Option to sync their calendars from IBM Notes to Microsoft Dynamics CRM
- Flexibility to set up rules that filter calendar activities based on certain criteria




“Riva freed up the Fonds’ Portfolio Managers to focus on what comes first – their clients. The Fonds’ future plans for Riva? “... to keep using it!”

The next evolution – 360⁰ Insights

Customer Intelligence, relationship analytics, and cognitive insights directly in your IBM Notes client





- Server-side, centrally managed & controlled client plug-in
- Direct data access from CRM & multiple targets
- The ability to provide relevant CRM & third-party information to users based on their roles
- The ability to expand Riva Insight's real-time access to CRM & data from multiple sources














Powered by Riva

Riva Insight

Contact ▾



 **Shred-it**


 2794 South Sheraton Way, Oakville, ON, Canada




 Thu 10:13 PM
        


Account Type: Customer - Direct


Industry: Other

 **Abe Alexon**



Regional Sales Manager

 Thu 10:13 PM  

 (555) 203-8000



 a.alexon@shredit.com

Assistant: Noela Noxire

 **Asst. Phone:** (555) 381-7555

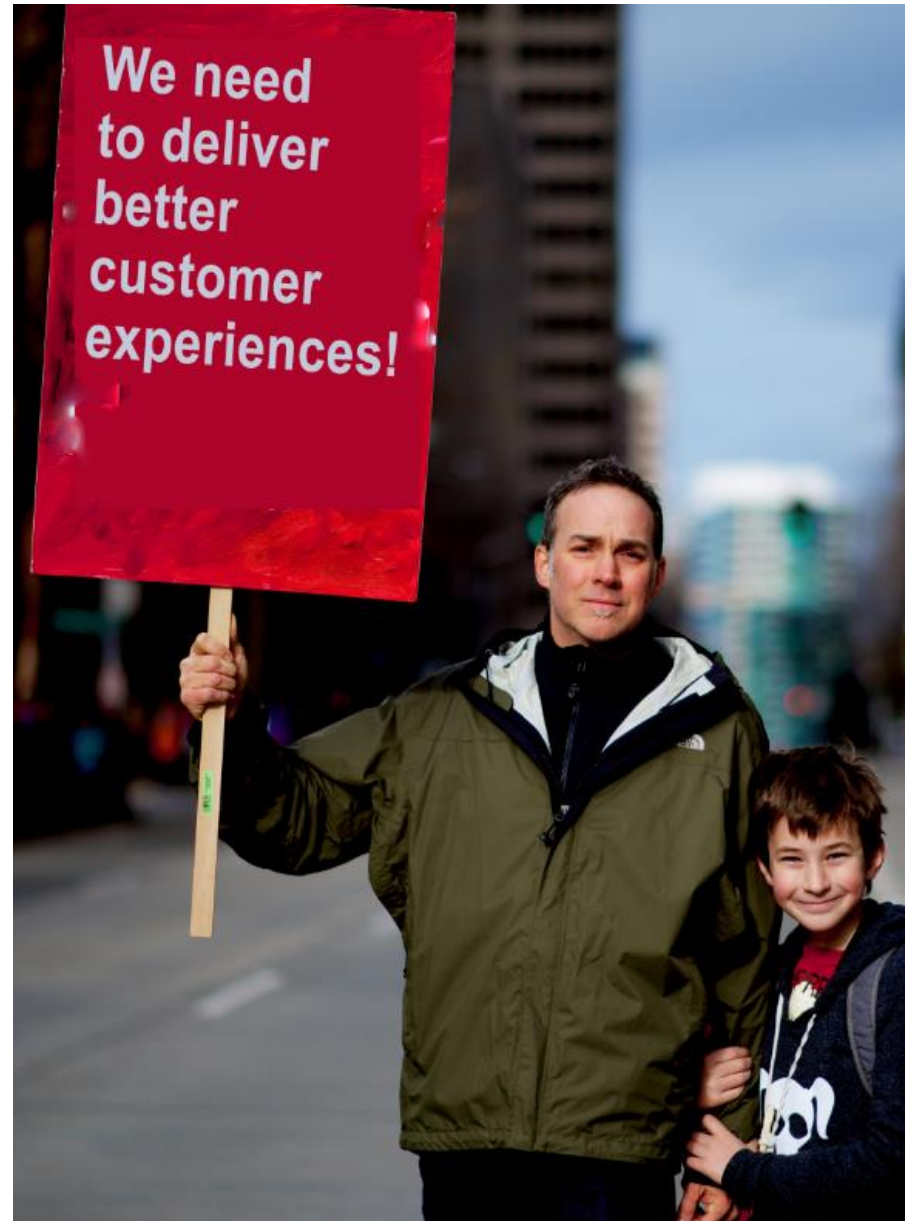
▶ Upcoming Events

▶ Recent Interactions

 **Aleon Erixon**


Again we're all human

- CRM users need more information at their fingertips
- 3rd party sources need to be integrated
- For actionable customer intelligence



Resources

Riva Cloud

- How to get started:
<http://kb.rivacrmintegration.com/78/> (incl. technical background)

Riva On-Premise

- How to get started:
<http://kb.rivacrmintegration.com/47/> (incl. technical background)

Sync Solution Deployment Overview

IBM Notes and Domino:
<http://kb.rivacrmintegration.com/entry/912/>



youtube.com/user/crmintegration



+49.8192.99733.25

Questions and Comments

Thank you

emea@rivacrmintegration.com

www.rivacrmintegration.com

#ThinkRiva

Download free 15-day trial!