KeyedIn Integration with Salesforce

Overview

In organizations where all or a portion of the project portfolio is defined by sales-related efforts – such as the sale of technology products with associated implementation services – forecasting, capacity planning and project creation can be a complex, time-consuming and often inaccurate process. With limited visibility into the sales cycle tracked in the customer relationship management (CRM) system, portfolio managers can struggle to understand the impact of future demand, and even frequent status reports can become outdated in minutes.

The union of KeyedIn Projects and a CRM system like Salesforce eliminates the guesswork by bringing key sales data into the project portfolio management (PPM) system as it happens, allowing PMO leaders to:

- Accurately forecast capacity
- Save time by automating the creation of standardized projects
- Improve customer satisfaction by giving more accurate timelines for project completion
- Eliminate the errors inherent in duplicate data entry

The capture of Salesforce opportunities is the key driver for this integration with KeyedIn. A Salesforce opportunity can initiate a project in KeyedIn through one of the following ways:

- When a new opportunity is created
- When an existing opportunity reaches a certain stage in the sales cycle
- Through a custom integration point based on the unique needs of an individual customer

KeyedIn remains the system of record and centralized place for all project-related and non-project-based work for capture, approval and management. All resource information can be stored and managed within KeyedIn.
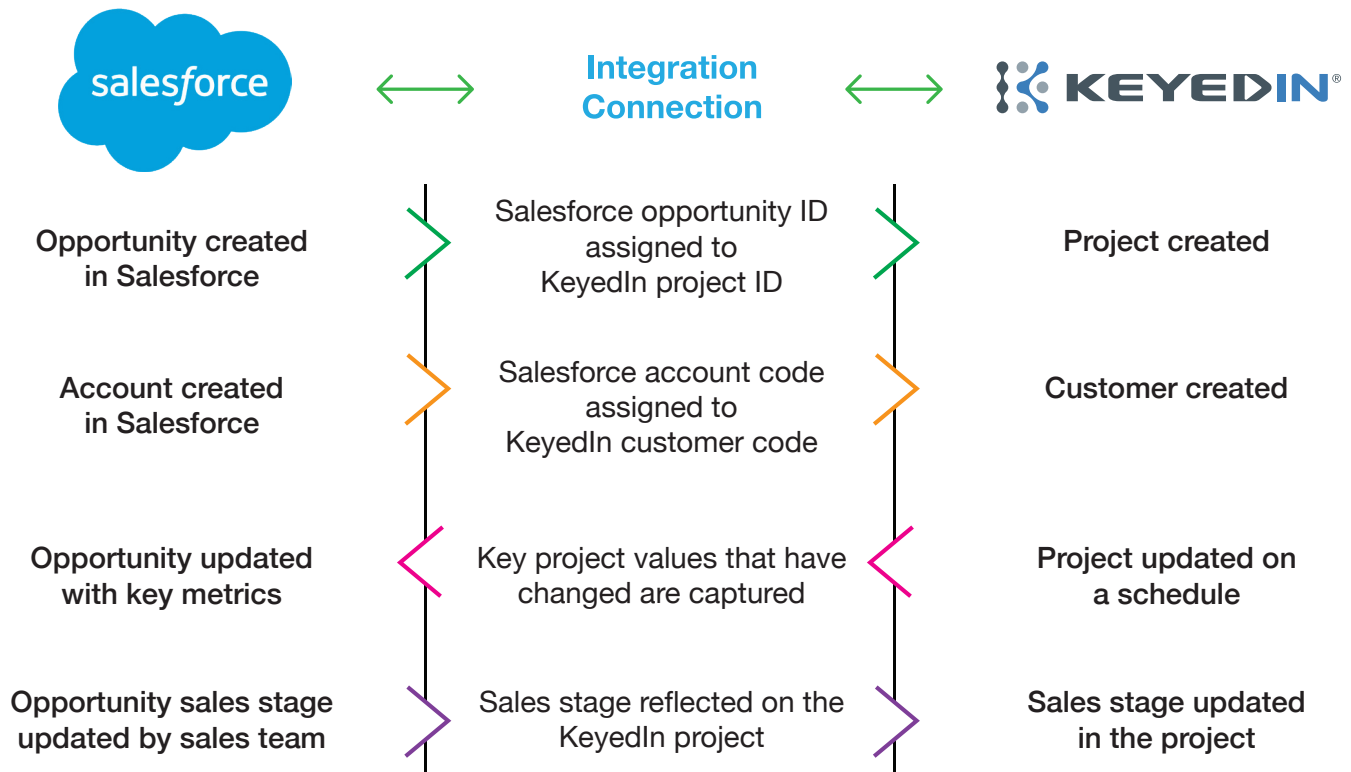
How It Works

Integration between KeyedIn Projects and Salesforce is achieved through connectors, process alignment and data mapping. Each integration is unique to every customer and configured to the specifications of each customer and their implementation of the required systems.

CONNECTORS: KeyedIn Projects connects to Salesforce through industry-standard RESTful APIs.

PROCESS ALIGNMENT: Configured processes support the flow of events and standard error or exception handling based on our configuration best practices:

1. Projects are created when the Salesforce opportunity meets a predetermined stage in the sales cycle.
   a. The Salesforce account associated with the opportunity is transferred to KeyedIn if it doesn't already exist in KeyedIn Projects.
2. The KeyedIn project is updated with key information obtained from the Salesforce opportunity on a scheduled basis.
3. The Salesforce opportunity is updated with key project metrics from KeyedIn Projects on a scheduled basis.

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salesforce	⟷	**Integration Connection**	⟷	**KEYEDIN**®
Opportunity created in Salesforce		Salesforce opportunity ID assigned to KeyedIn project ID		**Project created**
Account created in Salesforce		Salesforce account code assigned to KeyedIn customer code		**Customer created**
Opportunity updated with key metrics		Key project values that have changed are captured		**Project updated on a schedule**
Opportunity sales stage updated by sales team		Sales stage reflected on the KeyedIn project		**Sales stage updated in the project**

Supported by Our Experts

The KeyedIn Professional Services team will assist you every step of the way to design, develop and deploy the KeyedIn-Salesforce integration through our open API. Specifically our expert consultants will take the lead in three key areas:

- Design – Map the application architecture to assign which data will feed through the systems.
- Develop – Build the integration processes and interlock strategy.
- Deploy – Provide a central platform for rolling out integrations and managing their health, activity and ongoing support.

Experienced Seamless Integration and Effective Project Management

"Just when we were looking for a robust cloud-based solution for our company's complex, ever-changing global business structure, to manage our projects, we came across KeyedIn Projects among its counterparts in the marketplace. It is fast enough and can be used and accessed anywhere in the world. KeyedIn Projects has enabled us to ensure agility, scalability, and accessibility in our projects through a multi-tenant SaaS architecture. It also lets us deliver changes and improvements faster, and to all clients at the same time. In addition, it offers users the ability to configure applications to fit their unique business needs."

— *R&D/Product Development Executive in the Finance Industry*

About KeyedIn® Projects

KeyedIn Projects is a supremely flexible solution for managing projects, programs and entire portfolios – from a single platform that provides a comprehensive view of the status of every project. Used by project managers, boardroom decision-makers, and frontline users, KeyedIn Projects increases success rates and profit margins, enables better decisions about project selection, planning, and prioritization and optimizes resource usage across the entire business. Headquartered in Minneapolis, KeyedIn has hundreds of customers worldwide, including Walgreens Boots Alliance, LexisNexis and Office Depot.

For more information, visit www.keyedin.com

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