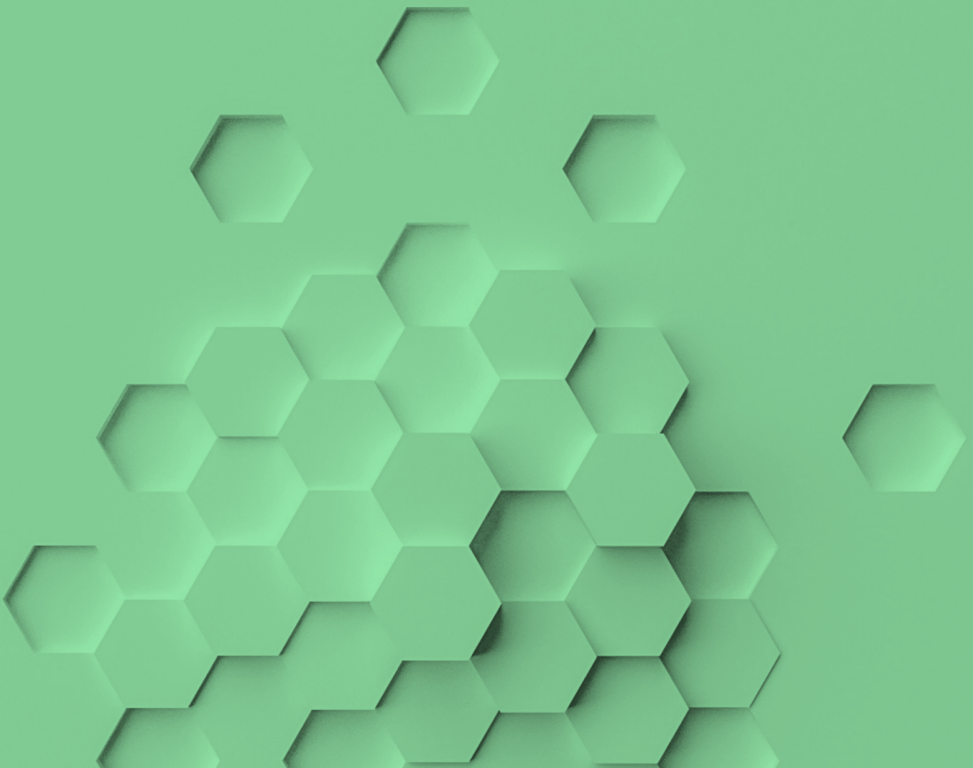


The **UNRIVALED** Guide to

PROCESS INTEGRATION

FOR SERVICE MANAGEMENT



a  **perspectium** publication

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PREFACE

Due to our desire for each integration book to tell a complete story, some of the high-level content in this book is replicated from our Data Integration book – since it is applicable here too.



If you haven't read *The Unrivaled Guide to Data Integration*, you can download a copy for free from perspectium.com/dataguide

A new employee has been hired.

Whose job is it to bring that employee on board? Although an HR Onboarding Specialist may have the primary responsibility, the hiring triggers a number of processes across multiple departments. There's work to be done in HR, Facilities, IT, Finance, Security, Training, and more.

For efficiency, these groups have processes in place to handle onboarding routinely. Process integration is what enables these departments to perform their part in these processes with accurate data and with their favored technology.

What Is Process Integration?

Process integration is the connection of individual components of business process to enable the execution of processes that span multiple departments or applications within an organization.

Consider the process of customer service.

Without process integration, when a customer calls customer service, a customer-service agent may create an IT-related case in a CRM tool. The agent would then reach out to the IT support team (typically via email



Process
integration
automates
processes that
extend beyond
one application

or phone) to ask them to work on the problem, and then keep calling them regularly to obtain status updates. If the IT support team had to assign work to a different group (such as development) there would be additional layers of complexity and communication added.

With process integration, when a customer calls customer service, a customer-service agent would create a case in a CRM tool and assign it to the IT support team. This would create an incident in the organization's ITSM tool, and eBonding¹ of the records would ensure that all groups/applications involved have clear visibility into the progress of work. If other groups had to be involved in resolving the customer issue, process integration would ensure that they also had access to all the relevant information, and transparency was maintained across the entire process.

Why Do Process Integration?

Process integration exists because workflow extends beyond a single tool.

Consider how business is done. Workflow extends across departments, most of which have applications especially suited to work in those departments. An organization conducts seamless business most effectively when its workflow extends across departments and applications.

¹ eBonding - the act of integrating and automating bi-directional data synchronization between unique tools/enterprises and their systems

Your service management workflows should be inclusive of any tool that participates in a process that allows work to take place. Process integration is about making that inter-application workflow happen.

A major benefit of process integration is that it automates processes that extend beyond one application. The resulting efficiency makes departmental work more agile and meaningful. The improved data accuracy helps you to avoid making errors, while departmental personnel continue working in the apps of their preference rather than being forced into cultural changes.

Sometimes, people consider alternate approaches to process integration ...

"One App to Rule Them All"

You need to be able to connect processes and data across your entire organization - but moving to an expensive, all-encompassing "suite" means that you are moving away from your best-of-breed tools, locking yourself in with a single vendor, and driving huge cultural change. And, on top of all that, there's no guarantee that those suite applications will actually work together the way that you expected.

You will not be getting the best application in each application space, and you will find yourself compromising on functionality



When you let departments work in their favored apps, you avoid forcing unwelcome cultural changes

for the sake of ease-of-acquisition and promised interoperability.

“Isn't a Best-of-Breed Setup More Complex?”

The integration of apps from different vendors is the primary reason that everybody doesn't pursue the best-of-breed model.

Until recently, one of the most common solutions to this problem has been the use of iPaaS integration platforms - with their hundreds of connectors - but they bring their own challenges to the table. Now you have yet *another* technology to manage; *another* language to learn; *another* piece of software to maintain; *another* team of people you need to hire. And you still have to build the integration yourself - what you are getting “as a service” is just the underlying platform - not the integration.

But the world of integration has come a long way since the days of building your own APIs, writing web service calls, and maintaining all the app connections yourself. Vendors are now emerging that not only connect your applications together, but manage that connection, and take complete responsibility for getting your

data from where it is produced to where it is consumed - even if those apps are in completely different environments. These vendors take the “heavy lifting” out of integration, so that all you need to do is configure what data should go where and when. You can even make integration a part of your existing business



workflow – so that as your process moves from one app to another, your data does too.

As a result, the integration challenge has become a *lot* less daunting – and that makes the best-of-breed approach a *lot* more achievable.

How Does Process Integration Happen?

Process integrations typically exchange data that is part of an executing workflow process. These integrations may be between service management tools, between enterprise applications (such as Jira, Salesforce, ServiceNow, Remedy and SAP), or they may connect out to third-party service providers.

These are usually two-way integrations – since synchronization is required in both directions, with single records syncing multiple times in multiple directions before the workflow is complete.

Getting on the Right Path with Process Integration

Imagine if your teams could continue using the best-of-breed tools that they use today – and you could seamlessly flow data and process between them? You would avoid the expense of new applications, retain vendor flexibility, reduce unnecessary organizational change, and allow your teams to continue using the products that they already selected to help them work.

Whatever the purpose for process integration, the project can still seem daunting. When a business tackles an integration on its own without doing all the right homework or when it purchases the wrong solution, the implementation is complex,

the system performance lags, the data security is compromised, and the business is left with ongoing maintenance problems.

On the other hand, the right integration solution can both maintain and advance your service management. But it is important to know what to look for.

In this guide to process integration for service management, we'll show you why companies integrate specific processes, what a good process integration looks like, and how you can maintain the health of your process-integration solution.

Sure, companies integrate processes for a variety of reasons, but do you know what processes you need to integrate? Take a moment to write down the problem you need to solve. Or if the reason for integrating is clear, just note it mentally.

We invite you to browse over the various process-integration use cases in this chapter. It may be that one will stand out as applying especially to your situation. You may even find additional ways that you can enhance service through new use cases.

Let's look at those use cases - reasons that companies integrate processes.

Connecting Workflows to Enable DevOps

ITSM users don't like being forced to work in your company's development tool - or vice versa. An integration can ensure that work flows seamlessly between ITSM and the development system, and that the work stays in sync, complete with worknotes, attachments, and other relevant records.

Palo Alto Networks, a leader in firewalls and other next-generation cybersecurity solutions, needed to improve the visibility of incident and enhancement requests from their users. Requests were submitted into ServiceNow, and information was then manually created in Atlassian Jira via "swivel chair" integration. Often, the ServiceNow request would be closed out while the issue/request was being managed in Jira, which meant users could not see their request status.

In addition, development teams needed a more accurate understanding of all demands being made on resources, relying on estimations without any consistent integration between their service management and development systems.

Using a process-integration solution, Palo Alto Networks created clear status visibility for users after they submit requests and throughout the request cycle. Customers no longer have to check status of their tickets in multiple tools or search endlessly in their email.

They also have an improved understanding of the development effort required to resolve the issues and changes being requested by the users and can more accurately plan for resource allocation in the future.



Flowing Process Between CRM and ITSM

When the customer service team is connected with the IT service team, both teams can pass cases between systems, complete with attachments and related records. By keeping systems in sync, everyone knows what's going on.

Crossfuzze, a managed service provider, integrates their customer's Salesforce instance bidirectionally with Crossfuzze's ServiceNow instance, allowing Crossfuzze to manage CRM case data in their ITSM instance.

Listen to Matt Miller of Crossfuzze (Virteva) discuss such integrations in this 1.5-minute video: <http://bit.ly/crm-itsm>



Integrating Service Providers in Your Workflows

Through integration, companies that hire a service provider can assign a ticket to a service provider in exactly the same way that they do with internal teams – ensuring that all the relevant information is passed along, and that they have clear, real-time visibility into how work is progressing.

It is not just companies that seek out integrations to the managed service providers (MSPs) that they hire. The providers themselves pursue process-integration solutions to enhance the services that they offer. See Chapter 5 for more on integrations for service providers.

Seeking to integrate business processes and enhance technology enablement, **Zurich North America**, a ServiceNow customer, embarked on a SIAM (service integration and management) initiative to integrate its service providers into its IT service management organization. The first phase of their project had taken 6 months, had cost \$400,000, and had not accomplished its objectives.

Zurich now uses a process-integration solution to integrate ServiceNow to its global telecom services provider to send and receive incidents tickets in real time, going live in 2 months at less than a quarter of the original project cost. Zurich now has a real-time bidirectional integration platform that it can use to onboard other service providers and/or additional processes with existing service providers.



Connecting Internal Teams Using Different Tools

It's not uncommon for organizations to have more than one ITSM tool - and while that may not be ideal, not keeping those systems in sync is even worse. With integration, such organizations can share CI data, knowledge and other data - and assign work between tools - without the hassle of swivel-chair "connectivity".



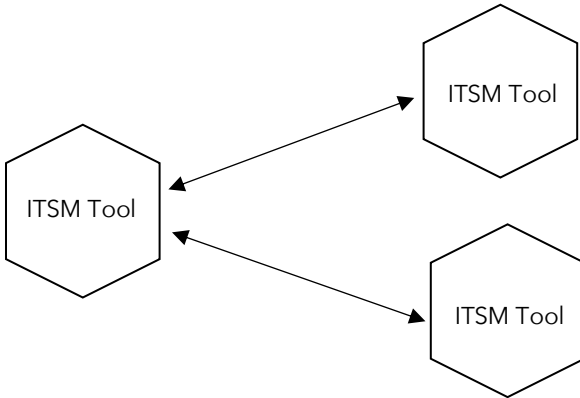
Automating Knowledge Management

Even if a business has several tools collecting knowledge articles, the company can bring them all together and share their organizational knowledge via an integration. They can also automate knowledge article approvals between tools to deliver process consistency.



Managing Acquisitions and Divestitures

If two organizations are merging - or breaking apart - an integration can keep ITSM data in sync and allow for the use of business rules to determine which data should be stored in which system(s).



Which of These Use Cases Fit You?

It may be that you have a primary integration project in mind.

But the discussion of use cases in this chapter can prompt ideas for additional ways that you can integrate for better service management.

Refer to this chapter again in the future when you need ideas for how process integration can enhance the work you do.

When you connect your systems, it's important to know what to look for.

Kick the tires and keep a discerning eye on your options for integration solutions. Integration projects require significant resources, so you'll want to opt for a solution that checks out.

Emphasis on Data Quality

As you pursue your goals in service management, you collect data from multiple, disparate systems of record (e.g., ITSM system, CRM system, ERP system), usually maintained by their respective departments. But without a method of ensuring consistent data across systems, the risk is high for inefficiency, errors, and several other problems in your service management efforts.

So, your data should propagate without any loss to that data. To ensure data integrity, look for a cloud-based integration service that understands a variety of data schemas, including file attachments, reference fields, and hierarchical tables.

Real-time Delivery

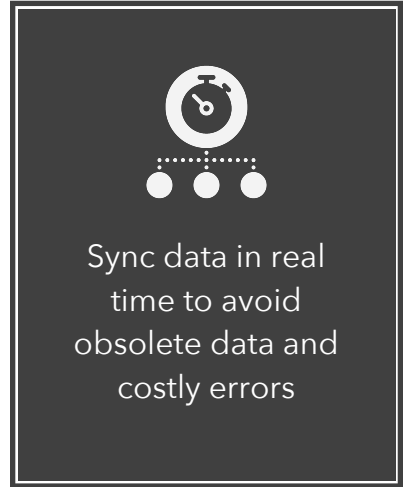
Scheduling your data exchanges for the "off" hours means working with obsolete data. In fact, if your data does not sync within seconds, it is out of date and could lead to costly errors. When you sync in real time, you work with certainty.

A live view of customers and business processes gives companies actionable information. IT Directors and C-level

Executives, eager to keep their teams agile, do not want a view of their companies from last week or even yesterday. They want to know what is happening right now.

The result: real-time data transfer and reporting, with minimal latency, is a highly desirable service.

If you are a service provider, your customers desire real-time delivery, too. Such functions give service providers a chance to deliver extra value to customers.



“We found that actually we needed [knowledge sharing] faster than once a day. . . . So if a knowledge article is updated by their team, we’re pushing that over to Crossfuze’s instance immediately so that our analysts that are using those articles have that most recent content to provide support” - Matt Miller, Crossfuze.

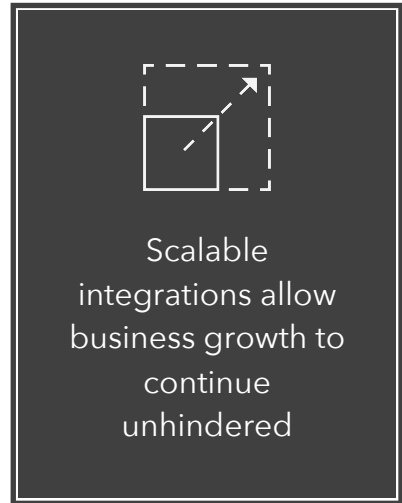
Security

It’s critical that integrations are secure. Many, however, are not. When an outage occurs for one or both applications being integrated, companies frequently lose data. You can avoid this loss by making use of data queuing. With this technology, even if a connection fails, the in-transit data is still saved, ready for completed delivery whenever the endpoint is back up. This data queuing gives more security for your data.

Scalability

When dealing with automation, IT leaders are aware that a breakdown at any point in the otherwise well-oiled machine will impair the whole system. They want seamless and supported connectivity that continues to function in the face of challenges to scalability:

- A growing number of integration endpoints
- A growing volume of data to be transferred
- Systems needing to be updated or replaced
- Trained personnel leaving
- New security or privacy rules needing to be expertly applied



A scalable answer to these challenges integration as a service.

Integrations scale easily when the integrations are implemented, monitored, and maintained as a service by an integration provider. Up front, you can know the provider's exact costs for integration as a service, without your having to worry about finding, hiring, and training more talent for growing integration needs. The scalability of personnel is inherent in integration as a service.

When an app updates, when an endpoint is replaced, when new security and privacy rules take effect, when personnel in the IT

department move on, the provider handles the challenges to the integration itself, freeing you to focus on other matters.

Availability

With your integration solution, you should have the option to receive data at multiple targets after sharing once. Publish once, subscribe everywhere. Also, check on the solution's ability to function in the face of power and network outages.

Before having an integration solution that offered the availability made possible by data queuing, **Crossfuz** dealt with the regular frustrations of lost data and hours of maintenance - *"We were having challenges with data drops between REST calls between instances. So, we weren't getting all the updates from our customers' instances—working endless hours on troubleshooting where something left one instance but never showed up at the other, and understanding where that gap was, and what we could do to solve that problem. And really the problem was we had no queuing functionality, right?"*

"If I had a customer that I was integrating with to pull their data, . . . during that window that the instance was going through that upgrade, we had no way to queue any data that needed to be sent to them. And then send it once that upgrade was complete? We didn't have that capability" - Matt Miller, VP of Delivery, Crossfuz.

Bring Them All Together

Companies seek real-time, scalable delivery of data without interruptions, slowdowns, or data loss – all while maintaining high levels of security.

Keep these qualities of good integrations in mind as you look toward implementing an integration solution at your company.

Businesses approach integration through one of five solution models. Their integrations may even progress through these models in the order below, ultimately embracing the end-to-end service available in the model “integration as a service.”

Swivel Chair

This approach is used in many companies. Someone reads data from one system and re-enters it in another.

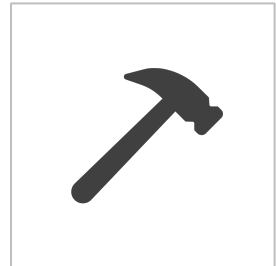
It may be transactional (like replicating an incident to create a development request) or batch (copy a snapshot of CMDB to database), but it can be inefficient, error-prone, and a risk to meeting response and resolution SLAs. This type of integration is suitable for very occasional data transfers only.



Do it Yourself

Businesses with large IT organizations often turn to this approach. Writing your own integrations (or having a consultant do it) might sound like a cheaper way of connecting to your suppliers, but anyone who has done it will tell you otherwise.

Creating and maintaining custom integrations can be both inefficient and expensive. Also, integration development is not in your development team's wheelhouse - your developers should be focusing on developing your company's competencies since that is where



they will add the most value. The *do it yourself* approach is only really viable for smaller, low volume “one-off” integrations.

Vendor Consolidation

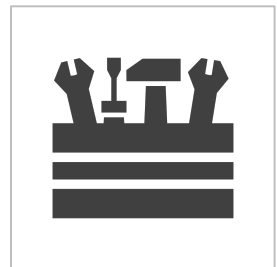
An integration model often proposed by large software vendors involves either migrating all applications to a vendor “suite” (as opposed to the more common “best of breed” approach) or using the software vendor’s own integration technology. Many suite products are comprised of disparate components of self-developed, acquired, and/or open-source software. Exploring how these modules share data and operate collectively may lead to the discovery of an assortment of integration approaches that are less seamless than expected.



Additionally, the ambition of software vendors to be the singular “system of record” for your process usually means that the integration technologies they create are far better at pulling information IN to their products than sending information OUT to the other repositories you may want to use.

Integration Toolkits

These came into being in the mid-2000s as an attempt to solve the enterprise integration problem. And while these iPaaS products might get you part of the way there, you still have to learn a proprietary language to create an integration, and you still need a team to manage the data getting from point A to point B.



These toolkits are often nothing more than an ETL bus, and a collection of adaptors. It's like the IKEA of integration - you still have to build it yourself, just from larger pieces.

Integration as a Service

The modern approach to integration is delivered as an end-to-end service. The integration vendor takes responsibility for getting data from A to B, following rules defined by your business processes. In this model, there is nothing to write, assemble or maintain - and the integration is typically delivered as a subscription service with 24/7 support, in monitored and automated datacenters.



Integration as a service takes traditional "as a service" benefits and applies them to integration service. So, the reliability, simplicity, scalability, and accessibility that you get from software as a service are also benefits of integration as a service.

With integration as a service, you work with a vendor that can implement quickly, using standard deployment with in-built best practices. The vendor takes responsibility for the integration software, ensuring that the integration continues working securely and reliably . . .

- Even through app upgrades
 - Even in the face of new security and privacy laws
 - Even through your personnel changes
- Even as your business grows and your processes scale

This model shifts the burden from the customer's shoulders to the vendor's. Upgrades, outages, version compatibility, and so forth are not problems for you the customer - but for the vendor to take care of behind the scenes.

What does process integration look like when service providers come into the picture?

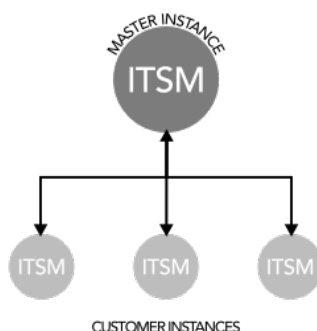
In this case, process integration enables inter-organization workflow. Process integration for service providers usually transfers less data than typical data integration would. But the data that does transfer is part of a workflow process between customer and service provider.

These integrations could be between your customers' enterprise applications (like ITSM tools, development tools, CRM tools, and more) and your own master instance. These are two-way, real-time integrations - delivering synchronization in both directions, and including attachments and related records.

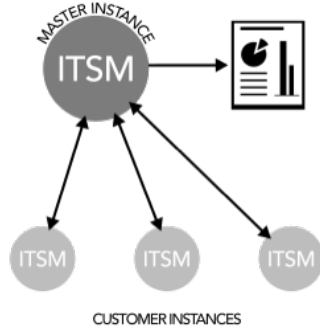
Use Cases for Service Providers

Process integration helps service providers carry out important business functions.

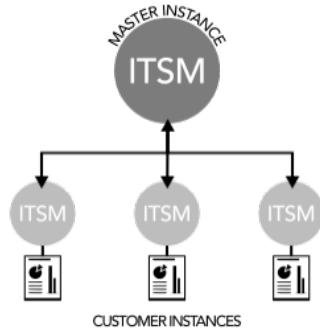
- *Participating in customer processes.* Service providers can e-bond to their customers in real time to facilitate process integration without the hassle of building and managing the integration themselves or doing it manually.



- Maintaining a uniform view of all the service provider's customers.* Even though customers may be using different tools, a common ITSM data model ensures that the service provider can view them all side-by-side in real time. So, service providers can understand their customer commitments constantly, not when something goes wrong.



- Giving customers visibility into the service provider's processes.* An ITSM data model ensures that customers get information from the service provider in a form they understand. So, when customers need to understand the provider's service, customers can get all they need from within their own ITSM tool, no matter what they use.



- Management of service levels.* Real-time, auditable data exchanges ensure that service level measurement is accurate and consistent. This has obvious financial implications when penalties are being imposed for the service provider.

Functioning as a Service Desk for Customers' Users

Crossfuzze, a service provider, was seeking “a single pane of glass” where they could monitor and control data related to their customers’ applications, including Salesforce and ServiceNow. Functioning as the service desk for multiple companies, Crossfuzze receives up to 40,000 calls per month and needed to scale beyond the swivel-chair technology of moving between multiple ticketing systems.

Crossfuzze achieved that single system of action that they desired by integrating with their customers’ ITSM instances. Crossfuzze created a federated system of record for incidents, CMDB and knowledge; lowered costs by providing a single place to work for their agents; and increased security by not requiring multiple logins.



The original integration setup at **CDW**, a retailer and managed service provider, hindered scalability. CDW needed low-coding, real-time, truly automated integrations that help to ensure accurate data, a hands-off approach for CDW delivery staff, and high visibility for customers into their environments.

Making use of integration as a service, CDW now has a scalable integration solution, complete from end to end, that serves CDW customers better.

1. No extra coding: CDW offers customer integration solutions that no longer require extra coding by them or by their customers.
2. High visibility and automation: Because CDW enables visibility into incidents, their customers have confidence about the status of their environment. Both CDW and their customers can easily make comments and assign tickets to one another.
3. Real-time data transfer: The real-time nature of the new dynamic shares takes the headache out of trying to ensure data integrity. According to Paul Liesse, Supervisor of Managed Service Applications, *"We don't have to worry about when a particular job runs to query the ServiceNow data. ServiceNow will just put those records on the bus when they're updated, and those changes will get replicated out right away."*

With a complete integration solution in place, CDW is well-positioned to scale their service management. "We're just in the platform, using it as a normal user," says Paul. "And the developers don't have to get involved. That's humongous for us."

After you decide on an integration solution, it will need to be implemented, maintained, and possibly enhanced.

Implementation

Integrations should demonstrate value rapidly, without requiring large teams of implementers at your organization.

To get up and running fast, select a solution that does not require coding or a complicated setup. Ideally, the solution is implemented as soon as you turn it on. The interface should also have familiar language and technology, enabling ease of use.

If you're shopping among vendors, look for a provider that is able to deploy subsequent integrations quickly.

As you prepare to implement, be ready to communicate some information to your integration provider. For example, at the least, have application names and locations available. But also, do some thinking about what you want to integrate that's more specific than just two apps.

- You may plan to integrate one ITSM instance to another, but what fields do you wish to integrate? What is the field called at the source and the corresponding field called at the target?
- Will the data flow one way or bidirectionally? (Most process integrations are bidirectional, but many data integrations are one-way.)

- What event triggers the data flow? What should make the integration run?

The more you can tell your integration provider in advance what exactly you would like the integration to look like, the faster and more smoothly your implementation can take place.

Maintenance

Beware of do-it-yourself toolkits or packaged integrations, which can drain your time by requiring constant maintenance. It's probably obvious that in-house integrations usually require in-house maintenance. But even companies that use platform toolkits for integration often have huge teams managing them.



Maintenance
issues can
unexpectedly
disrupt service and
raise costs

A different approach is to opt for integration as a service – a complete solution, fully monitored, maintained, and supported by the solution provider. Clearly, it would be expected that such integration as a service would be more costly. But shop around. You might be pleasantly surprised to find a vendor not only with an end-to-end solution but also with very competitive pricing.

For their real-time bidirectional integration with their service providers, **Zurich Insurance**'s integration lets them map their processes to a standard incident data model and enable eBonding of incidents using an end-to-end cloud integration service.

This created a reusable approach for Zurich to use with additional service providers and allowed for easy maintenance of existing integrations. The integration rules were all configured within ServiceNow, rather than with custom code, and was the only work Zurich IT staff needed to perform.

Keeping Your Integrations Thriving

You can take some simple steps to get even more value from your integration solution.

1. *Articulate the business benefits.* As companies move forward after they implement an integration, they find that analyzing and expressing business benefits in more detail prompts ideas for refining and expanding their integrations. Of course, in the face of budget pressure, articulated business benefits protect their integrations as well.

2. *Articulate the ROI of your integrations.* As you analyze the business problem and integration benefits in more detail, you are more likely to quantify the return on investment. To help you do so, consider the cost savings or new revenue made possible because of enhanced performance, stronger process, service continuity, new services made available, and reduced maintenance.

3. *Maintain communication with your integration provider.* If you selected a vendor for your integration rather than building the integration on your own, staying connected with your provider presents new ways to enhance business value. A complete integration solution will include the services of a customer success manager. This contact person is your advocate at the provider and a source of support for you. Also, a constantly evolving integration provider offers new developments to augment the integration possibilities for your company. Stay aware of new developments by attending webinars, following the blog, and connecting on social media.

4. *Learn new use cases.* A major advantage of using a provider's solution over a custom-built solution is that the provider has seen (and implemented) a host of integration use cases. Read online stories about those customers and ask your contact at the provider for ideas about business challenges that you face. Also, keep an eye out for new product releases. Providers



Integration stories
offer insight for
better service
management

often roll out extra features and functionality that they make available to customers at no extra charge. These changes can help you meet more needs and gain new business value.

5. *Engage in the customer community.* When you sign up for an IT solution, you also often get the benefit of access to a network of customers who are in similar shoes to your own. Is there an online customer community? Does the provider offer in-person events that let you meet with them and other customers?

When your integrations thrive, you enhance business value for your company - and, in the process, you give solid evidence that your IT endeavors are critical to the success of your company.

At this point, you likely realize that process integration is vital for effective delivery of services and the overall success of your business.

What you may not have realized is that it also serves your efforts toward digital transformation. Like businesses around the world, your company may have started pursuing an organization-wide re-engineering of business and technological processes—a business overhaul known as digital transformation.

Consider how process integration plays a role.

Digital Transformation at Your Company

A key theme in digital transformation is automation². Businesses automate for artificial intelligence, for robotics, and for Internet of Things. How does automation play a role in service management?

IT teams automate many service-management elements, including knowledge management and incident management. Through process integration, you can trigger automated status updates, assignment of incidents, and a number of other actions.

² <http://reports.weforum.org/digital-transformation/maximizing-return-on-digital-investments/>

Another key theme in digital transformation is the reinvention of services to adapt to customer expectations³. Because siloed data and apps weaken the quality and reduce the efficiency of those services, integration is essential.

With new services being made available, businesses create new streams of revenue, boosting their financial stability.

Process integration makes new services available, sometimes directly, and sometimes indirectly as a result of freeing up resources to let you focus on your mission.



More Flexibility with Best-of-Breed Apps

To meet the pressing needs of automation, data accuracy, and rising customer expectations, an all-encompassing "suite" of applications isn't the answer. It's expensive, it demands cultural change, and data becomes increasingly locked into one vendor. And if your "one app to rule them all" goes down, where does that leave your entire company?

On the other hand, integrating best-of-breed applications at the process level gives your organization flexibility. It gives you more control over your data and enables you to work with the

³ <http://reports.weforum.org/digital-transformation/the-race-to-meet-customer-expectations/>

best applications in the various application spaces. There's a reason that different apps are known for different purposes. And there's a reason that different departments in your company favor working in different apps. Some apps do ITSM best, others CRM, others Development planning, and so forth.

Process Integration as a Service


Companies that implement process integration know that process extends inter-departmentally. They respect the autonomy of departments that prefer their own apps, all while avoiding the data lock-in of individual apps.

Process integration also enhances business efficiency by the automated triggering of actions and status updates. With improved data quality, leaders get confident visibility that helps inform more effective business decisions.

A vendor that delivers process integration as a service takes responsibility for these integrations, including all the qualities that your integration solution needs: security, availability, scalability, privacy, and so forth. When disruptive events happen such as upgrades or app outages, integration as a service ensures that your data ultimately gets where it needs to be. In short, you offload your integration worries, letting the vendor take care of them.

If you're ready to speak with someone about about bringing process integration as a service to your business, visit <https://www.perspectium.com/get-started> or call 1-888-620-8880.

**For additional information on process
integrations for service management,
please visit perspectium.com**

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