

## Integrated eCommerce for Small and Midsized Companies offering Connectivity between ERP, CRM, POS and Social Media



**Bill Parkinson**  
President

**CEOCFO: Mr. Parkinson, what is the focus at Iciniti today?**

**Mr. Parkinson:** We develop connected ecommerce for small to midsized companies.

**CEOCFO: What do you understand about the process that perhaps others do not?**

**Mr. Parkinson:** The big thing that we keyed onto is connectivity. In the past, we talked about integration only to the ERP, but today people are looking for much more than that. They want connectivity between the ERP, CRM, POS, ecommerce, and social media...all of those things. I think what we do differently is that we look at the data much more holistically. Business owners serve multiple stakeholders. They will have their own internal staff as well as external customers, and they all want to have access to a common data set. The CSRs or the sales department are going into the CRM and they want to see web, POS, ERP and CRM generated data. Accounting wants to view similar data from the ERP and your customers want to see the data on the web to see what they have been buying and what they may want to buy in the future. Sales wants to look at it to see whom they can market to. I think that is what we do differently from any of our competitors. We create that connectivity to a homogeneous data source.

**CEOCFO: Are customers coming to you because they understand the depth of your offering or is it a surprise when they find out?**

**Mr. Parkinson:** The simple answer to that question is...yes. They come to us because they understand that we integrate deeply to Sage 300 and that is what they are looking for, that deep integration on the accounting side. When they get here and find out how much more we can do for them, I think that is a bit of a surprise.

**CEOCFO: When a company comes to you, what is the process? How do you help access what they should be doing, what they can be doing and what they really want, not what they think they want?**

**Mr. Parkinson:** We try to sit down with the client and create a very detailed statement of requirements. Often times we will go through their existing site with them and have them show us what they like and what they would like to improve and record it using tools like GoToMeeting. We then walk through all of their processes and write up a very detailed statement of requirements. The Statement of Requirements tells us **what** they want to do and then we create a statement of work that explains **how** we are going to do it. Between those two documents, we typically get a good understanding of what their needs are. We try to look at things they might be able to do that they have not thought of yet. Oftentimes people do not think that they can have a customer-facing portal that would show clients their open invoices and allow them to pay online. We allow them to do all of that. Or have a web order desk for their sales reps so that they can be mobile and still place orders on behalf of clients.

**CEOCFO: What services do you offer that people are missing? Are there certain areas where companies typically fall short?**

**Mr. Parkinson:** I go back to this whole concept of connectivity. It seems simple, but companies struggle with the concept all of the time. Connectivity started to be talked about in the context of social media "Can we connect on Facebook or LinkedIn?" That is one facet of connectivity, which we fully support, but there is so much more. Is your web store and website fully connected or are they loosely bolted together? Is your web store connected to your POS? Can you share customer profiles between CRM, POS and the web? One area that I am always surprised that people miss is having a website and web store as a single entity. Again, this is important for customer experience. Often, when a customer goes to a website and looks up a product, if they decide to buy they click on "STORE" which takes them to a site that may or may not even look the same. Then they have to start the search all over again so that they can purchase the product. How much nicer if the web store and website were one and a single lookup would take you to a product you could buy?

The service that we provide is helping companies understand why this is important. It is all about user experience. Any time that every department and application has access to the same data you can make the users experience more fulfilling; whether it is as simple as sharing loyalty points between your brick and mortar store and your web store or as complex as marketing from CRM based on sales made from the web and/or POS system.

**CEO CFO: *What is involved at an implementation?***

**Mr. Parkinson:** We do a unique installation for each of our customers on the server or hosting platform of their choice. Unlike all of our competitors, who share a single installation between their customers which must be on their servers, our customers can choose where they want to host. Our clients tend to be larger Sage 300 clients and they want to be able to customize the software to meet their exact business needs and to create a unique customer experience. They do not want to take something out of the box and force their customers into that; they want to be able to say, "We need you to modify the software to meet our clients' needs rather than us changing our business rules to meet your software's needs." In Iciniti's case, if the company can give us a business rule, we can make it happen. Therefore, our implementations tend to be a bit more complex, but the result is a website tailored to your specific needs.

**CEO CFO: *Are you surprised that so many companies, in general, do not understand that you should meet the customer where they want, not where you want them to be?***

**Mr. Parkinson:** I think that inherently, companies understand that. What they find unusual is a company that agrees and says, "Yes we can do that for you." Most software companies have products that come off the shelf with certain configurations as opposed to customizations. You have to make your company fit the software. I think they are a little surprised when they run into someone that says "Tell us what you want, we will make it happen." I think that they want to give their customers a great experience. I do not think that is an issue with most small and mid-sized businesses. I think that over the years they have been trained to not expect that. They come to the table not expecting you to say that you can make it happen for them. They are not used to software designed from the ground up to be customizable.

**"It is all about Connectivity and giving all applications access to a single data set." - Bill Parkinson**

**CEO CFO: *How do companies find you? Do many search online and if so, what terms would they key in to find you?***

**Mr. Parkinson:** We have a good relationship with many of the biggest players in the Sage 300 channel. With the larger Sage resellers, we have long-standing relationships, so when they find a client that they think fits our software we typically get a call from them. However, it is also not uncommon for the companies to go searching on the web and just look up integrated ecommerce for Sage 300 and find us.

**CEO CFO: *What has changed in your approach over time? What have you learned along the way?***

**Mr. Parkinson:** I think one of the big things that we changed back in 2010 was when we rewrote our software. One of my clients stood up at a conference and told the assembled Sage resellers "If your clients do not have content management today, they are looking for it." We realized that just having a web store was not enough and you needed that full content management system. If I, as a person who runs a business, were looking for this kind of functionality, then others would be too. I do not think of myself as being unique as a businessperson. So in 2010, we redesigned our software and we built it inside of a content management system so that ecommerce content was no different from any other corporate content. Which meant that you would be able to drag-and-drop ecommerce controls onto any page the same way modern Content Management systems drag-and-drop image, blog, word processor or event controls. With our software, you can do that. The marketing department can add a new page; you do not need an IT person to add pages to your web store. They can create a marketing piece and drag-and-drop a buy button on to that page and easily link the buy button back to a product in Sage 300. I think one of the things that we learned over time was that there was this real need for people to have a unified web store/website. It goes back to that customer experience. In the old days, you had a web store and a web site and they were unique from each other. When you did a search for something on the website, you would find a product and get a nice description of it but then you would actually have to go out of there and go into the web store and do your search again. When you combine content management and ecommerce, you do a single search, find the product, buy the product and move on. This makes for a much better user experience for the customer.

**CEO CFO: *With more visibility and different people that have access to data in what you provide, how do you reassure your clients that everything is safe and secure?***

**Mr. Parkinson:** We actually do build a credit card application as well that interfaces with Sage 300 and we go through the same security testing as Sage does. Every couple of years we pay about \$25,000 to have our software fully tested by an

independent security company called Security Metrics. They go through our software from top to bottom to make sure there are no holes and then we submit that to the PCI council. Security is always one of those things that is going to be an ever-changing beast. Even the big players that are creating SSL Certificates are finding holes; that is the stuff that we rely on. All you can do is align with one of these worldwide security companies and have them test your software on a regular basis.

**CEOFO: *Are clients paying lip service to security but not as concerned as everyone should be?***

**Mr. Parkinson:** There is definitely lip service. I ran into a very large potential client about two months ago that has stuff on their website for credit card. When a customer purchases, their web site sends an email down to their staff. The email has all of the credit card information, which they then walk over and type it into the credit card terminal. That flabbergasted me. This is not a little company and you would think in today's world that they would have caught on that that is just bad. We get resellers emailing us credit card numbers to pay their account. I'm like "Come on guys, seriously?"

**CEOFO: *What is next for Iciniti?***

**Mr. Parkinson:** We are just starting planning on our 6.0 product and it is going to be still all about connectivity but even more so in that we are now looking at things like deeper integration to POS systems. We will be integrating to additional accounting software, therefore, we are looking at making our data source agnostic so that we can unplug from Sage 300, and plug in Sage 100 or Microsoft AX or Sage X3. Even on the front end with the content management systems, we want to allow people the flexibility of additional content management systems rather than just the one that we offer today.

**CEOFO: *Why now?***

**Mr. Parkinson:** It is time. We have brought the same code forward over several editions and it is time to do a ground up rewrite. I like the direction that Sage's new CEO, Stephen Kelly, seems to be taking the company and we are often asked to add other Sage products to our offering. A rewrite will allow us to do that. However, more than that, we have all of our eggs in one basket, which is not a good thing. It is time to create a product that will allow us to expand both within the Sage brand and outside of it. Obviously, with our history, Sage products will be first.

**CEOFO: *Why choose Iciniti?***

**Mr. Parkinson:** Iciniti understands PA DSS security and PCI security. In addition, it is this whole concept of connectivity; the idea that you cannot live in a vacuum anymore like so many of our competitors and even ourselves lived in for ages when we thought ecommerce was the be all and end all. It has to be part of this completely homogenous data set that is feeding all the applications. A couple of years ago, I was doing a session trying to explain this and I thought of Galileo. Galileo was the first to propose the idea that the earth revolved around the sun when people, at the time, believed the sun revolved around the earth. I think IT was like that a few years back when they believed that the center of the IT universe was the application and the data simply revolved around the application. Over time, we have come to realize that the center of the universe for IT is really the data and the applications are like planets around that data. I think that is what we, at Iciniti, grasp and are trying to bring to our clients, the view that the data has to be something that everyone can access. No matter how you get to the data, through web, POS, CRM or CMS, consumers of the data must be seeing the same information. I think ecommerce really brings that to the forefront because it is the first time that companies have opened up their data to the outside world and many are struggling with the concepts - what do I show and what do I keep internal? We are trying to help with that.

Interview conducted by: Lynn Fosse, Senior Editor, CEOFO Magazine

---



## **Iciniti Corporation**

For more information visit:  
[www.iciniti.com](http://www.iciniti.com)

**Contact:**  
**Bill Parkinson**  
**866-424-6484 Ext 248**  
**[bparkinson@iciniti.com](mailto:bparkinson@iciniti.com)**