

# VERTEKS CONNECTION



VOLUME 9 NUMBER 3

## Maximizing the Value of Salesforce.com



*By integrating the ShoreTel IP phone system with Salesforce.com, Verteks helps RME boost sales productivity and tap robust call reporting features.*

If anyone understands how to effectively develop and manage sales processes, it's RME. The Tampa, Fla.-based firm specializes in comprehensive direct marketing solutions that drive consumer response. A key component of RME's strategy is the use of data to drive lead-generation campaigns and social event marketing programs.

When RME began looking for a new phone system, the company naturally turned to Verteks Consulting, a longtime trusted partner. Verteks recommended the ShoreTel Unified Communications and Enterprise Contact Center solutions — and showed RME how the ShoreTel platform could integrate with Salesforce.com.

“We came to work with Verteks as a vendor for our previous phone system and Verteks was my first choice when we needed to replace that system with something new,” said Scott Marvin, IT Director, RME. “Verteks came

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# Maximizing the Value of Salesforce.com

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in and quickly installed the system for us and proceeded to implement all of the additional features and functions that ShoreTel provides, both standard with their equipment and the add-ons we purchased along with it.”

Combining ShoreTel with Salesforce.com in a customizable user interface enables agents to handle calls more effectively. Unified communications functionality and on-screen data facilitate real-time collaboration and speed response times. Call reporting features enable sales managers to fine-tune processes.

“Ours is a sales and marketing organization, and it’s primarily outbound sales,” Marvin said. “After learning that ShoreTel had Salesforce.com integration, we asked Verteks to add that piece. It has been a great system — it seems like there’s nothing it can’t do.”

## An Extension of Salesforce.com

Salesforce.com is a powerful customer relationship management (CRM) and sales force automation (SFA) solution and one of the most popular Software-as-a-Service (SaaS) applications available. It enables organizations to maintain a single, shared customer profile company-wide and manage opportunities across the sales cycle. It also provides comprehensive reports and real-time dashboards that enable organizations to track and measure their sales activities.

By integrating Salesforce.com with the ShoreTel system, Verteks helped RME enhance the features of both solutions. The ShoreTel Salesforce.com Call Center Adaptor allows agents to dial, answer and transfer calls, put callers on hold, initiate conference calls, and more — all from within the Salesforce.com application.

ShoreTel also adds call reporting data to Salesforce.com. This feature enables continuous server-to-server export of ShoreTel Call Detail Records to Salesforce.com, linking call activities to Salesforce.com reports and dashboards.

“We first purchased the ShoreTel Salesforce.com Call Center Adapter, which connected our phone system into Salesforce.com. That works really well,” Marvin said. “We are also using ShoreTel Enterprise Contact Center to route inbound calls to different agent groups within our sales organization. An agent can update the Salesforce.com record that goes along with the call.

“The ShoreTel reporting component pushes our Call Detail Records into Salesforce.com every five minutes so we can see reports in one interface. The sales managers like it because it’s almost real time. And all of our calls are record-

ed so they can go back and listen to the phone calls that were made to specific prospects or customers.”

## Part of the Sales Process

RME considered a number of phone systems and found that ShoreTel offered the features and reliability it needed at a competitive price point. Marvin says he likes the way the ShoreTel system is engineered and that the ShoreTel switches are solid-state appliances. He also likes the design of the desktop handsets.

The opportunity to work with Verteks was another important plus.

“Verteks has always provided good service, so I stuck with them,” said Marvin. “They have really fast turnaround times. Whenever I’ve had a critical problem, they have been prompt in getting back to me as soon as I report the issue.

“Of course, the ShoreTel system is so solid that nothing ever really goes wrong with it. We haven’t had any downtime at all.”

Salesforce.com integration is a little-known feature of the ShoreTel Unified Communications solution. Verteks leveraged its extensive experience with the ShoreTel platform to rapidly implement a solution that precisely met RME’s needs.

“Verteks has really good engineers who handled the integration,” Marvin said. “Their expertise made the difference and we’re very pleased with the result.”

RME’s phone system has always been an integral part of its sales activities. Thanks to Verteks and ShoreTel, RME’s sales processes are now tightly coupled with the ShoreTel IP phone system, improving agent productivity and customer service and providing sales managers with the data they need to maximize results.

## Verteks Connection

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### Storage to Dominate Cloud Adoption

While both Software-as-a-Service and Infrastructure-as-a-Service have greater degrees of current implementations, cloud storage represents the greatest number of planned implementations, according to a Twin-Strata survey of cloud-friendly users. Nearly 90 percent of respondents either currently use or plan to use cloud storage.

Nearly two-thirds of respondents cited scalability and the need to easily manage growing storage needs as the top values cloud storage could provide. More than two-thirds of respondents with plans to implement cloud storage either agreed or strongly agreed with the statement: "It seems like we are always running out of storage." By contrast, current cloud storage users scored a full 20 points lower on the same question.

Meanwhile, 68 percent of current cloud storage users cited offsite data protection for disaster recovery as a key benefit, but only 26 percent of users with no cloud storage plans said the same. Eighty percent of current cloud storage users claim that they can recover their data in less than 24 hours, with nearly a quarter estimating instantaneous recovery. In comparison, nearly one in six respondents who do not use cloud storage estimated that it would take more than a week to recover their data in the event of a disaster.

### Gartner: IT Leaders Have 'Big Data' Plans

After a few years of experimentation and early adopter successes, organizations are beginning to embrace larger-scale adoption of big data technologies, according to Gartner, Inc. In a worldwide Gartner survey of IT leaders, 42 percent of respondents stated they had invested in big data technology or were planning to do so within a year.

Gartner says organizations are turning to big data technology for two reasons: necessity and conviction. Organizations are becoming aware that big data initiatives are critical because they have identified obvious or potential business opportunities that cannot be met with traditional data sources, technologies or practices. In addition, media hype is often backed with rousing use cases.

"This makes IT and business leaders worry that they are behind competitors in launching their big data initiatives. Not to worry; ideas and opportunities at this time are boundless, and some of the biggest big data ideas come from adopting and adapting ideas from other industries," said Frank Buytendijk, research vice president at Gartner.

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# Clouds Go ROGUE

*Majority of IT professionals say rogue public cloud services negatively impact budgets and operations and bring security, compliance concerns.*

**S**ome call them rogue clouds, others call it “cloud sprawl.” Either way, there is growing concern among enterprise IT professionals over the unauthorized use of public cloud services by business units within the enterprise.

A rogue cloud is defined as a public cloud application that has been deployed within an organization’s business operations without approval of the IT department. According to a recent survey by Symantec, 77 percent of organizations uncovered rogue cloud deployments within the preceding year.

The ever-increasing use of public cloud services within the corporate environment is a trend most technology professionals see as negative. According to the 2013 PMG Cloud Sprawl Survey, 52 percent of IT pros say cloud sprawl will have a significant or somewhat negative impact on operations and resources. Unauthorized cloud services of most concern include the use of public cloud storage (70 percent), cloud synchroniza-



*Among respondents to the Symantec survey who reported rogue cloud issues, 40 percent experienced the exposure of confidential information, and more than a quarter faced account takeover issues, defacement of web properties, or stolen goods or services.*

tion (68 percent) and cloud-based collaboration applications (53 percent).

The unauthorized usage of public cloud services seems to be on the rise despite attempts to limit it. Among the IT professionals surveyed by PMG, 89 percent say that employees understand the need for data security, and 54 percent say their organizations have a policy in place regarding the use of public cloud storage services. However, 43 percent admit to being only "somewhat effective" in educating business users on the pitfalls of the public cloud. Sixty-four percent say much of the increased usage of cloud solutions has been driven by the Bring Your Own Device (BYOD) trend in today's workplace.

## **Trouble Ahead**

It's easy to understand the lure of rogue clouds. Employees have grown accustomed to cloud services for personal use and desire similar ease and simplicity for business requirements. IT procurement and deployment processes seem hopelessly slow and bureaucratic by contrast. The most commonly cited reasons for undertaking rogue cloud projects are to save time and money.

"This study found 38 percent of IT respondents turn to the cloud because it offers faster deployment," said Joe LeCompte, principal at PMG.

However, unauthorized cloud sprawl poses a number of risks to the business, with security topping the list. The PMG survey found that corporate IT is most concerned about data security (79 percent), compliance (57 percent), network security (55 percent), loss of control (51 percent) and unmanaged applications (48 percent).

These concerns are well-founded. Among respondents to the Symantec survey who reported rogue cloud issues, 40 percent experienced the exposure of confidential information, and more than a quarter faced account takeover issues, defacement of web properties, or stolen goods or services.

Rogue clouds also increase the risk of data loss. About 47 percent of large companies and 36 percent of small to mid-size businesses have suffered theft of data via rogue clouds, according to the Symantec study.

Application integration is another challenge associated with rogue clouds. Sixty percent of those surveyed by PMG reported that big data is or will become vital in future enterprise cloud deployment. The ability to integrate data between cloud applications or between cloud and on-premises applications is key. To date, 46 percent have had compatibility issues when trying to integrate data between cloud and on-premises applications. Forty-six percent surveyed say this is because of the use of unsanctioned cloud applications.

## **Making Cloud Procurement Positive**

IT departments take a variety of approaches in responding to rogue cloud deployments. In the PMG survey, 65 percent of respondents said they evaluate the service before either approving or denying usage. Only 15 percent immediately pull the plug and 11 percent say they don't get involved in the deployment of department-level cloud solutions.

The strategies IT is using to better manage cloud sprawl are also varied. Nearly half (48 percent) assign an IT resource to work with business units/departments seeking cloud solutions, 39 percent have developed internal cloud solutions for business units/departments to use, and 33 percent have developed and enforce a corporate-wide cloud services IT policy.

The silver lining in the cloud sprawl conundrum is that 72 percent of IT leaders say employees are willing to use corporate-installed cloud solutions. If IT can provide private clouds that can match or surpass the user experience public cloud services seem to offer, the organization is more likely to win the war on rogue clouds. This is good because 82 percent of IT respondents are predicting the volume of cloud service procurement by business users over the next 24 months to be greater than it is today.

"At the end of the day, IT is not going to paint all public cloud solutions as 'bad'," said LeCompte. "In fact, 69 percent of IT executives say a hybrid cloud strategy using both private and public cloud offerings is the wave of the future inside the enterprise. Containing cloud sprawl to protect corporate information and ensure security can be done by providing cloud services in a structured manner with a proper governance framework."



# How to Protect Sensitive Data



*Storage encryption helps prevent embarrassing and costly data security breaches.*

**G**oogle announced recently that it will automatically encrypt all data held in its Cloud Storage service. Data and metadata will be encrypted using a unique 128-bit encryption key before it is written to disk, and the keys themselves also encrypted. The move puts Google ahead of Amazon, which has provided encryption for its cloud storage since 2011 but doesn't encrypt data by default.

Data encryption should help assuage the concerns many organizations have about cloud storage. Encryption effectively “scrambles” data, which cannot be read without access to the correct encryption key. As a result, encryption can dramatically reduce, if not eliminate, the risk of a security breach due to the loss or theft of stored data.

Google's encryption service also serves as a reminder of the importance of protecting sensitive data.

Storage, backup and archival solutions are designed only to preserve data; they don't protect against unauthorized access. Only data encryption can effectively safeguard so-called “data at rest.” As a result, organizations should consider incorporating encryption into their storage and backup environments.

Strong encryption using 128-bit or longer keys make it impractical to try to decipher the text through brute force. A 2012 report by the National Institute of Science and Technology (NIST) estimates that AES-128 encryption should be secure through to 2031.

## **Growing Requirement**

Organizations in certain regulated industries have very real incentives to encrypt data. The HIPAA Final Omnibus Rule requires covered entities to provide notice to affected individuals, the Department of Health and Human Services and in some cases the media if there is a breach of unprotected — that is, unencrypted — data. The deadline for compliance with the rule is Sept. 23, 2013.

But the healthcare sector isn't the only industry that promotes encryption. Under California's Security Breach Information Act and similar regulations enacted by more than 20 other states, companies must disclose even suspected security breaches to the media and all customers potentially affected. Encrypted data is exempt, however.

The Payment Card Industry (PCI) Data Security Standard mandates the encryption of stored data, including data on backup tapes — a rule that potentially impacts any merchant that accepts credit cards. Noncompliance can result in financial penalties ranging from \$5,000 to \$50,000 per month.

Regulatory requirements aside, the need to secure data is clear: a single data security breach incident costs \$5.4 million, according to the Ponemon Institute. Still, the price tag for data protection can cause sticker shock for many companies.

In addition, many organizations have operated under the theory that

encryption makes finding and retrieving information more difficult, increasing the complexity of storage and backup process. Indeed, traditional software-based encryption solutions required companies to make painful tradeoffs to achieve data security: performance degradation, operating system and application dependency or changes in workflow.

### A Better Way

The good news is that today's encryption devices can be so tightly integrated with the storage environment that they avert the unacceptable performance slowdowns of the past. Several vendors offer appliances that sit on the network, encrypting and digitally signing data on the fly. Because they sit "in-line" — that is, in the network data path rather than within application software or storage devices — they operate independently. They can be deployed with storage-area network

(SAN), network-attached storage (NAS) or direct-attached storage (DAS) solutions.

These solutions also provide better key management than traditional storage encryption solutions. Encryption rules can be used to minimize the number of keys to be managed and master keys can be used to protect the encryption rules. Centralized security management provides user authentication and role-based privileges. Encryption appliances can also monitor the physical access to the device itself and automatically lock down all encryption keys.

According to the Ponemon Institute's 2012 Global Encryption Trends Study, released in February, about 35 percent of U.S. businesses have an encryption strategy applied consistently across the enterprise. Encryption can help organizations meet regulatory requirements and prevent a costly and embarrassing security breach with little impact on IT operations.

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