Welcome to the CIO Hour!

March 2025

Avoiding the Integration Trap

Today's Panel

JOSH CARLSON
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Josh Carlson founded PerByte in 2011. Bringing over 20 years of experience in leading software projects and consulting teams Josh loves to design creative and beautiful solutions to the problems that associations face. His current work passion is designing solutions that can withstand the test of time and the change that comes with the evolving association industry. Outside of work Josh enjoys hanging out with his family and staying fit.

JAMES C. MARQUIS
Chief Information Officer, 501Works
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James C. Marquis is a seasoned senior executive with more than 30 years of experience working in technology with a wide variety of associations and nonprofits. James' work experience includes serving as CIO for a large medical association, CEO of a technology consulting organization and senior roles in product development and business consulting with for-profit and nonprofit clients. He also has designed and built multiple Internet-based business applications including Mojo Middleware™.

The CIO Hour: Avoiding the Integration Trap

- Tackling the problems and questions that are on your mind with real-world technology advice

- Featuring experts in their field with decades of real-world experience

- Usually the first Thursday of every month

Visit www.theCIOHour.com for upcoming topics and events.

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Ground rules…

- No question is off limits!

- If the question is too specific to a particular situation, we may defer it but are happy to talk to you offline or after the event.

- This is a safe space, but we understand if you wish to remain anonymous.

- You may claim 1 CAE credit – details will be emailed tomorrow

Agenda

- In the News – A few highlights that might interest you

- Q & A – 40 min – Discussion with our experts and taking your questions

- The CIO _after_ Hour – 30 minutes of open mic discussion

In the News…

1. DOGE shuts down General Services Administration technology consulting unit

   https://www.datacenterdynamics.com/en/news/doge-shuts-down-general-services-administration-technology-consulting-unit/

2. Trump's trade war draws swift retaliation with new tariffs from Mexico, Canada and China

   https://apnews.com/article/trump-tariffs-canada-mexico-china-643086a6dc7ff716d876b3c83e3255b0

3. World Backup Day – March 31, 2025

   https://nationaltoday.com/world-backup-day/

4. Celebrity Big Bear Lake bald eagles Jackie and Shadow welcome new hatchlings

   https://www.scrippsnews.com/science-and-tech/animals-and-insects/celebrity-big-bear-lake-bald-eagles-jackie-and-shadow-welcome-new-hatchlings

Today's Topic:
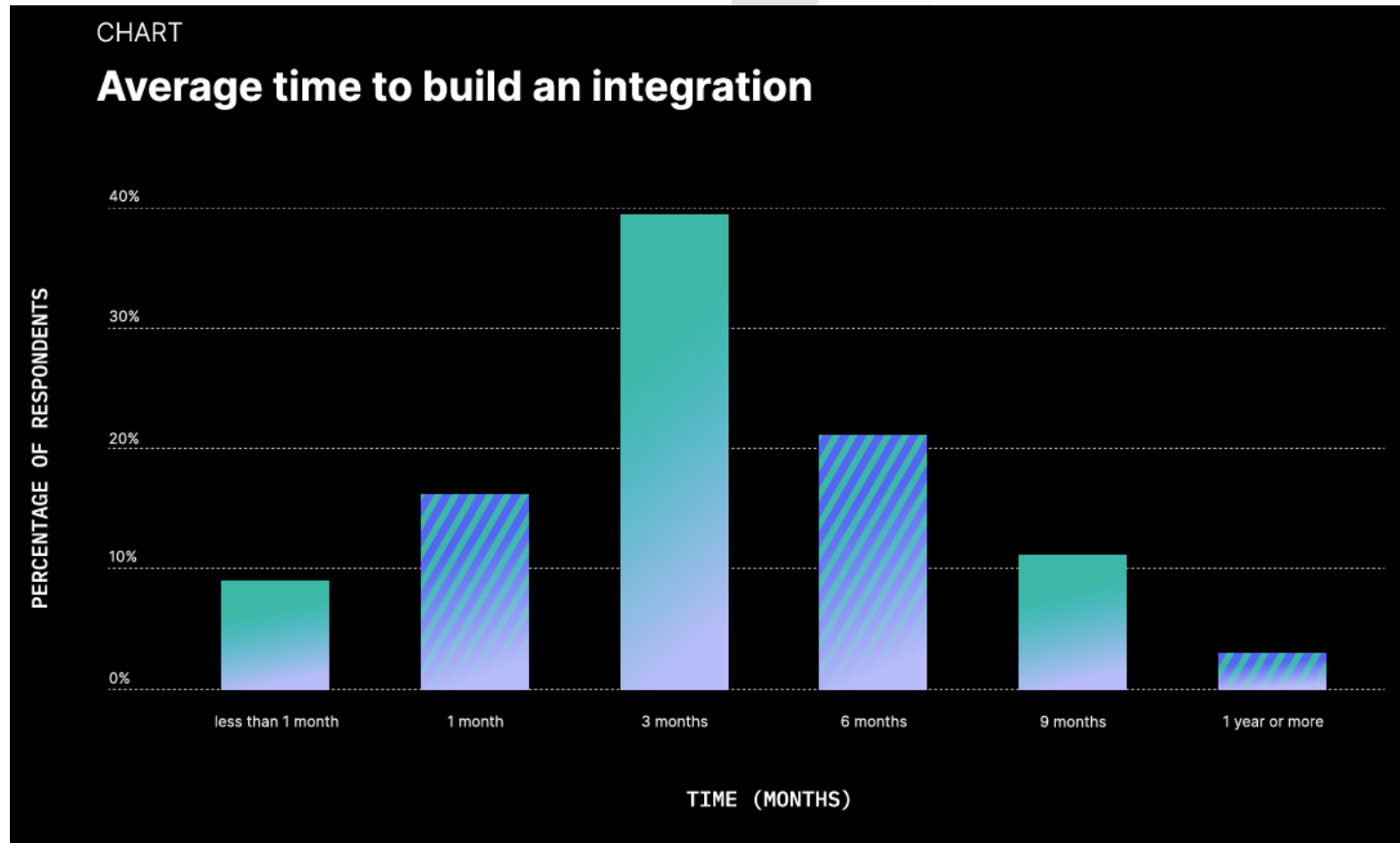# Avoiding the Integration Trap

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Integrations: By the Numbers

- **84%** of respondents said integrations were "very important" or a "key requirement" for their customers

- Only **1%** of respondents said integrations aren't important for their customers

- **75%** of respondents said it takes three months or longer to build an integration

- On average, the businesses we surveyed had **29 integrations**

- Top two challenges that respondents shared were both pain points around **maintaining their integrations**

SOURCE: https://go.partnerfleet.io/2024-state-of-saas-integrations?hsCtaAttrib=157139215031

2024

State of SaaS Integrations

We asked and leaders across SaaS answered. Here's everything you need to know about the state of integrations as you head into the new year.

SOURCE: https://go.partnerfleet.io/2024-state-of-saas-integrations?hsCtaAttrib=157139215031

On to Your Questions…

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What is an API
(and what is SSO)
(and what is ETL)
(and what is iPaaS)?

What are some of the options available for integrations that associations use?

Brought to you by

What is your take on using third party SSO integrations to platforms like Salesforce or Dynamics when there is native support for OAuth and SAML available from both platforms?

Brought to you by

How far should we go with our integrations?

Brought to you by

We are looking to change our AMS and it currently does not integrate with the accounting system we use. What is the best way to handle?

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How can associations best assess cost before a contract is signed?

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Are there other things we should be thinking about contract wise related to APIs and integrations?

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Are there any negatives that we should be aware of related to integrations?

Slide 17 - March 2025

Let's talk technical debt!

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What support do integrations need once they go live?

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Any last parting advice,
especially for smaller organizations...

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Other Questions?

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Thank you to our expert!

PERBYTE

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THE CIOHOUR™

Delivering technology that WORKS for your association.

CONSULTING

501 WORKS

- IT Consulting Services – vCIO Service
- Software Selection & Implementation Services
- Customized Software Solutions and Integrations

INTEGRATION

MOJO MIDDLEWARE

Mojo Middleware™ - Easily integrate your different association software packages with over 40 available connectors.

SOFTWARE

software Mage

Software Mage™ – Online tools helping you navigate the AMS/CRM selection process, gather requirements, draft your RFP, and evaluate vendor responses.

We are here to help!
Call or email us for a **30 minute free** consulting session

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Final Thoughts

- Join us April 3rd for **The Power of Peers**

- An archive of this presentation and today's Webinar will be posted on theCIOHour.com in a few days.

- Any suggestions for future programs? Topics you would like to see covered? Please email us: theCIOHour@501works.com

- For CAE credit – you will receive a link via email tomorrow so you can claim your credit and receive your certificate.