Integration
Automation
API’s
Challenges
Opportunities
What has changed?
Options
Elements of AI

- AI
- MACHINE LEARNING
- PREDICTIVE ANALYTICS
- DATA QUALITY
- STRATEGY
- RESEARCH & EDUCATION
- ANALYTICS
Creating Intelligent Services

AI is a wide-ranging term that can mean different things to different people.

We see AI playing a strategic role in automating key processes & creating a technology layer which predicts outcomes with regards to opportunities and risks that may exist or emerge for your clients and your employees.
Applied data science pioneer and best-selling author, Phil Winters, says...

“Data science and machine learning algorithms can help identify and isolate “outliers” or anomalies in operational and financial data. The problem is that until you invest in data quality, there are so many anomalies, there’s no perceptible value. But, the payback for the effort is fast and cumulative. The better your data gets, the easier to spot anomalies, the quicker to fix, the better the data and so on. It’s a genuine virtuous circle”

CTO of European Energy supplier says...

“Data is everything, and the quality of that data will impact success. In our case, we discovered that we were missing data of suitable quality for 65% of our machines. Once fixed, and this was not a trivial exercise, we were able to reduce our unnecessary service cycles by 75%. But it was worth the effort. Without the data we were wasting millions”
Practice Management 3.39
CRM 2.68
Document Management 3.68
Client Accounting (eg Xero, QBO, Sage) 3.79
Accounts Production (eg Iris, Caseware) 4.01
Audit 4.06
Corporate Tax 4.07
Personal Tax 4.06
Source of truth is now distributed
Where are your data assets?
Who will monetize it?

Scenario 1
Software authors have connected their systems but data exchange and integration is fixed. Firm needs to wait for enhancements to benefit from specific data integration requirements.
Any work is bespoke and susceptible to breaks if API’s change.
Scenario 3
Much the same as scenario 2 except security firewalls need to be respected between systems
Consider the earlier point regarding the Datawarehouse.
Scenario 4

One or more of the internal systems lack an API. Internal IT resource lacks the ability to create solid stored procedures that in turn need to connect to API.
Current Integrations

Software platforms within a solid blue line use SymConnect for synchronisation between the prime systems of SymphonyCRM (powered by SugarCRM) & Practice Management.

Related Integrations

Software platforms within solid orange currently stand alone from SymConnect but are planned to have their integrations migrated to SymConnect which will serve Practice Portal.

Direct Integrations

Software Platforms that are on the outside any of the blue or orange circles use direct API or Stored Procedure connections to the platform inside the blue or orange circle.

Sundry Integrations

Special routines or functions with a dotted blue line are stored within SymConnect database, are called by Advance Practice Management but don’t follow any SymConnect synchronisation logic.

Planned Integrations

Practice Portal and or SymConnect planned integrations.