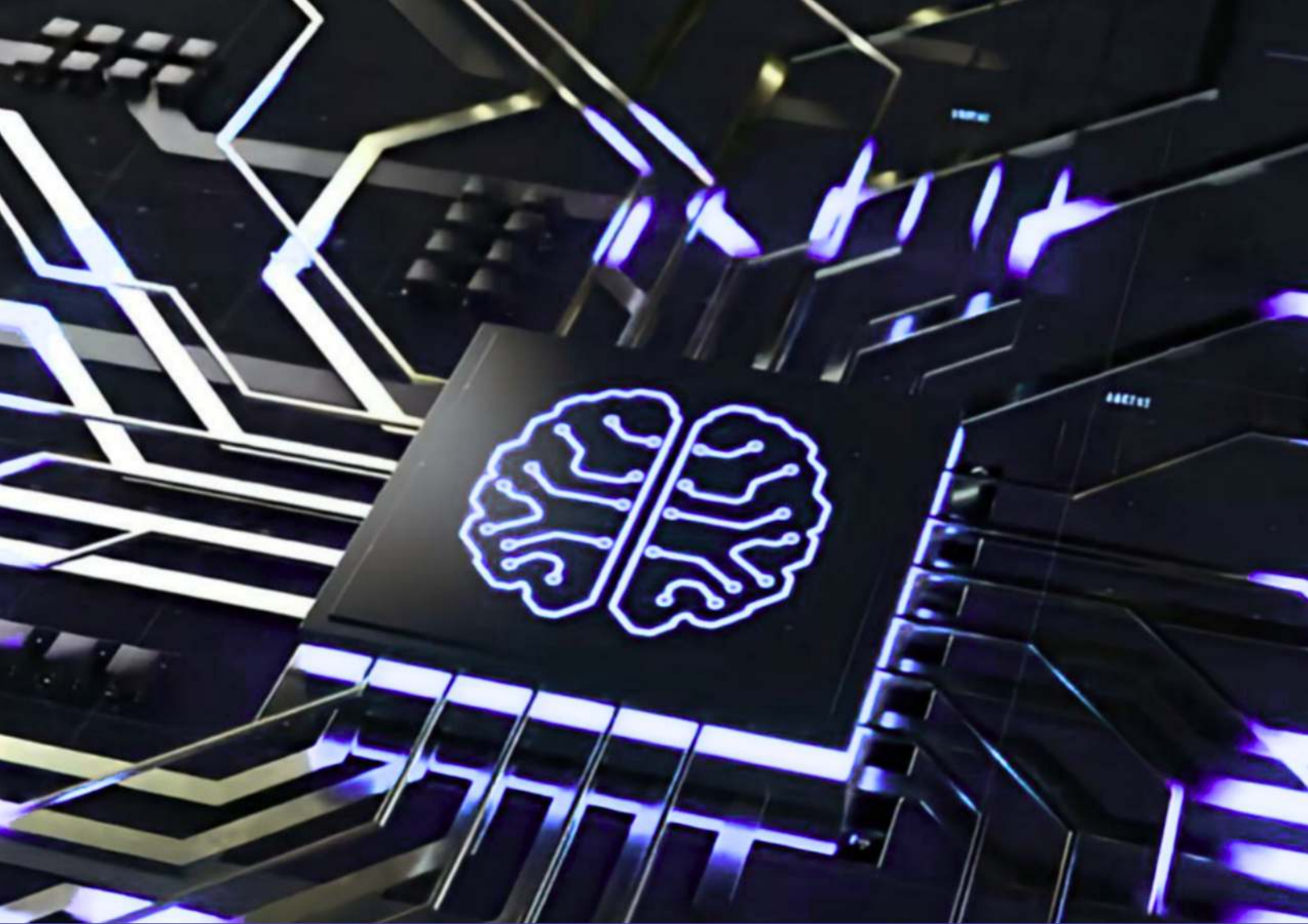




**YOUR SYSTEMS HAVE
THE ANSWERS. YOUR
TEAM SHOULDN'T
HAVE TO FIND THEM.**

BY ERIC WARD



A Builder Who Couldn't Stop Seeing the Problem

I thought I was done.

At 51, after co-founding and exiting a successful SaaS company where I'd spent 24 years as CTO, building and operating enterprise SaaS software, I figured I'd earned the right to step back.

Maybe travel? Spend more time with my wife, Julie, and our three boys? Work out? Relax?

Turns out, I'm not wired that way.

I'm achievement-driven. I'm accomplishment-driven. Learning and achieving just tick the box for me. So after a few months of "retirement," I realized I needed to get back in the game. I just didn't know what that would look like.

I started evaluating whether my future would continue in technology or evolve toward a completely new challenge.

Then I started paying attention.

Everywhere I looked, across industries and company sizes, the same problem kept appearing. Companies running five, eight, twelve systems that don't talk to each other. Executives pulling spreadsheets to answer questions their own software already had the answer to. Brilliant people doing busywork because their tools weren't connected.



A distributor who couldn't tell you which customers were past due and had open quotes, without pulling data from two different systems and building a spreadsheet by hand. A Shopify brand that had no way to connect orders, fulfillment, and customer history to answer why returns spiked last month. A property management company where lease renewals, work orders, and financials all lived in separate tools, and nobody had the full picture.

These weren't edge cases. This was the norm.

And that pattern recognition (built over 25 years of ERP integration and enterprise SaaS) is what kept pulling me back in. Not a single client request. A systemic gap.

I didn't need to leave tech. I needed a different challenge. And the challenge was everywhere.

After the exit, I thought I might be done. But seeing this problem up close, company after company, reignited my enthusiasm in a way I didn't expect. The same data fragmentation I'd spent my career solving at the platform level was crippling operations at the company level. And nobody was solving it in a way that actually worked for mid-market companies.

That realization is what led to Stratify.

Not a consulting engagement or a one-off automation. A platform — built to connect the systems companies already run and make their data queryable, monitorable, and actionable without replacing a single tool.

This book is about what I've learned across 25 years of building enterprise systems and solving data problems. It's about the patterns I've seen in company after company, and the platform I built to fix them. It's about my journey from being a nine-year-old computer dork to co-founding a company to building something I believe mid-market operations have needed for a long time.

But mostly, this book is about giving executives their time back. Because that's what this is really all about.

Breaking Things, Learning Fast, Never Quitting

The Green Screen That Started It All

I've been a computer dork since long before it was cool.

It all started when I was nine years old. My grandfather gave me a computer. I can't remember the exact model, a TRS-80 or something similar. It was this huge box with a green screen. Not color. Just green. And that computer changed my life.

I blew that thing up two or three times trying to hack it and figure out how it worked. I was the kid reading computer textbooks for vacation. I still read them, actually. Technical manuals. I know that sounds boring to most people, but I love it.

I've always had a fascination with making computers do stuff. I don't care about the hardware side. I mean, I can build a computer if I need to. But that's not what interests me. I like to make computers do things.



I liken it to being a wizard. I can make a computer do anything I want. And it's really fun.

From Laid Off to Leading

Fast forward to college. I went to Texas A&M and got my degree in Information Technology. I was still the computer dork. But I was fortunate enough to meet my lovely wife there, Julie, who saw a lot of potential in this diamond in the rough.

Right out of college, I went to work for Amoco, the big oil company. On my first day of work, I was told I was being laid off. Amoco had just been bought by BP at a 60-40 split, and my position was eliminated.

I remember thinking, "Oh crap, I just moved to Houston."

But here's the thing. My wife and I call these moments "Godwinks." It's when things happen for a reason you just can't explain. This was one of those moments.

Even though I was laid off, I still worked there for a year and a half. They put me on the email migration team. Amoco had 45,000 employees. BP had like 56,000 employees. This was before cloud computing. Companies ran their own email servers all over the world.

Since BP was buying Amoco, BP's email system won. The team I joined was looking at hiring a company to

come in and convert HP Open Mail to Exchange, all 30,000 mailboxes. I was 24 years old with nothing to do because, you know, I'd been laid off on day one.

I said to my boss, "Hey, why don't I try to do that?" The young kid fresh out of college wanted to give it a shot.

And I did it. I migrated all of Amoco's email accounts to BP. I flew all over the world doing it. And here's the kicker. The company that didn't get the job because I did it? They hired me to come work for them.



Sometimes the worst moments create the biggest opportunities.

What I Discovered Across Mid-Market Operations

The Manual Work Epidemic

After the exit, I started looking more closely at how mid-market companies actually run. What I discovered shocked me.

I had expected complex business challenges. I had not expected this much manual work.

Executives and operations leaders were doing hours of spreadsheet work just to understand what was going on in the business. Teams were copying data between tools. Finance departments were doing repetitive processes by hand. And the root cause was almost always the same: systems that don't talk to each other.

Let me give you a few examples of what this looks like in practice.

A distributor wants to know which customers are past due and also have open quotes in Salesforce. That's one question. But the answer lives in two different systems. So someone pulls a report from the ERP, pulls another from the CRM, and spends an hour building a spreadsheet to cross-reference them. Every week.

A Shopify brand sees a spike in returns last month and wants to understand why. The order data is in Shopify, fulfillment data is in a 3PL system, and customer history lives in their CRM. To connect those dots, someone has to export three data sets, merge them manually, and hope the formatting lines up. That's not analysis. That's data janitorial work.

A property management company needs to know which leases expire in the next 90 days and have open work orders. Lease data is in one system. Work orders are in another. Nobody has a combined view unless someone builds it from scratch — usually in a spreadsheet that's out of date by the time it's finished.

These aren't edge cases. This is how most mid-market companies operate every single day.

The Disconnected Systems Problem

Most companies I've worked with run between five and fifteen systems: ERP, CRM, eCommerce platform, HR system, project management system, accounting, inventory, ticketing. The list goes on.

Usually, none of them talk to each other in a meaningful way.

Information is trapped in silos. If you need a cross-functional view, you start copying and pasting, building ad-hoc spreadsheets, sending long email threads, and reconciling numbers by hand.

And the pain isn't just inefficiency. Leaders can't see what's happening across the business without assembling it manually. They're flying blind between the systems.

I've seen ops managers who set calendar reminders to manually check inventory levels because there's no automated alert when stock drops below a reorder threshold. I've seen finance teams who spend entire days reconciling data between their ERP and their CRM because the two systems track revenue differently. I've seen CEOs who can't answer a basic question about company performance without asking three different people to pull three different reports.

And every time I see it, the same thought hits me: this is a solvable problem. The data already exists. It's just locked inside systems that were never designed to talk to each other.

The Human Side of the Problem



Here's what doesn't show up in any efficiency report: the human cost.

When someone sees for the first time that a question they've been spending hours answering manually by pulling reports, cross-referencing spreadsheets, chasing down colleagues for data, can now be answered in plain English in ten seconds, the reaction is always the same. They light up. You can see the weight leave their shoulders.

That moment is why I do this work.

I love technology, but what really drives me is knowing I made someone's day easier and gave them their time back. That is the human side of operations intelligence.

How Stratify Works

You don't start with a transformation program. You don't rip out tools you've already paid for. You start by connecting what you already have.

Stratify is an AI-powered intelligence and automation platform that connects directly to your live systems — ERP, CRM, eCommerce, fulfillment, support, and more — and makes your data queryable, monitorable, actionable, and now buildable. No data warehouse. No sync project. No IT lift.

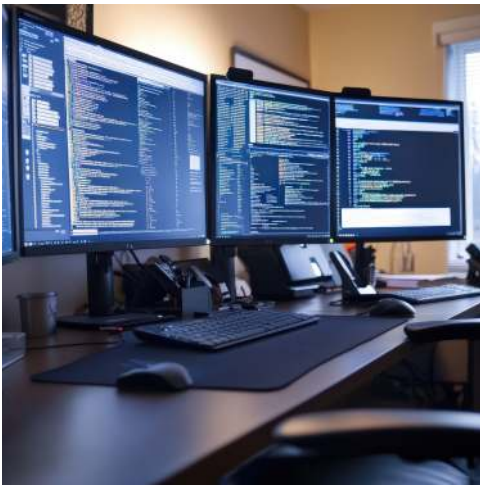
There are five things Stratify does. They work together, and together they change how your business operates.

1. Ask It Anything

Type a question in plain English. Get an answer pulled live from your actual systems in seconds.

Not a dashboard you have to navigate. Not an IT ticket that takes three days. Not a spreadsheet someone has to build by hand. Just a question and an answer.

“Which customers are past due and also have open quotes in Salesforce?”



That question lives in two systems — your ERP and your CRM. Most companies answer it by pulling a report from one, exporting from the other, and spending an hour reconciling them in Excel. Every week. Stratify routes that question across both systems simultaneously, merges the results, and delivers a plain-English answer with a data table you can act on immediately.

“What are my top five accounts by revenue this quarter, and which ones have open support tickets?”

That question touches your ERP, your CRM, and your ticketing system. Stratify connects the dots across all three and gives you one answer. No exports. No merging. No waiting.

What’s actually happening under the hood

Stratify doesn’t just forward your question to a database. It runs a multi-stage pipeline — classifying your intent, identifying which systems hold the relevant data, matching those systems to live connections, generating the appropriate queries (SQL against your ERP, SOQL against Salesforce, GraphQL against Shopify), executing them in dependency order, merging the results, and delivering a conversational summary — all in seconds.

That’s 25 years of integration knowledge baked into an AI pipeline, not a generic chatbot sitting on top of a spreadsheet.

2. Set It and Watch It

Most companies have someone whose job is effectively watching for problems — checking inventory levels manually, monitoring overdue accounts, scanning dashboards every morning hoping to catch something before it becomes a crisis.

Stratify replaces that with AI agents that run on a schedule, monitor conditions across your connected systems, and alert the right people when something needs attention.

An ops manager sets an agent:

“Alert me when inventory for any SKU drops below its reorder threshold.” Done. No more calendar reminders. No more morning spot-checks. The agent runs on whatever schedule makes sense — hourly, daily, weekly — queries your ERP live, evaluates the condition, and fires a notification to Slack, Teams, or email the moment the threshold is crossed.

A finance leader sets an agent:

“Alert me when a customer’s outstanding balance exceeds \$50,000 and they have a pending order.” That question spans your ERP and your CRM. Stratify runs it on a schedule, finds the matches, and surfaces them before the order ships.

A CEO sets an agent:

“Send me a weekly snapshot of revenue by product line versus last quarter.” Every Monday at 8 AM, it lands in their inbox. No one had to pull it.

3. Act On It

This is where most AI tools stop. Stratify doesn't.

When Stratify identifies something that needs action — a record that needs updating, a process that needs triggering, an exception that needs routing — it doesn't just tell you about it. It proposes what to do next, a human approves it, and it executes. Every action is logged with a full audit trail.

Why this matters



This is the capability that separates Stratify from every business intelligence tool on the market. BI tools are read-only. They surface data, generate reports, and build dashboards — but they can't touch anything. Stratify can insert records, update fields, trigger processes, and sync data across systems. With a human in the loop for every action that matters, and a complete audit log of everything that happened.

A practical example

An agent detects a customer with a past-due balance placing a new order. Stratify flags it, summarizes the situation, and presents a recommended action: put the order on hold pending payment confirmation. A credit manager reviews it, clicks approve, and Stratify executes the update directly in your ERP.

The manager didn't have to log into the ERP, navigate to the order, or remember the right process. They reviewed a recommendation and made a decision. That's it.

4. See Everything in One Place

Your data is connected. Your dashboards should be too.

Stratify gives you a single place to see what's happening across all your systems — live dashboards built from your actual data, saved queries you can run on demand, and a complete activity log of every question asked, every agent triggered, and every action taken.

No more logging into five different tools to piece together the state of the business. No more waiting for end-of-month reports to find out what happened three weeks ago. No more asking three different people to pull three different reports before a Monday meeting.

The data is live, connected, and visible to the people who need it — with controls that ensure they only see what they're supposed to see.

Stratify is permission-aware: it respects the security model of your source systems, so a salesperson sees their accounts and a CFO sees everything, exactly as your systems intend. Full audit trail included.

5. Build Applications on Top of It

Most platforms stop at surfacing data. Stratify goes further: it lets you build fully functional business applications — simple or sophisticated — that run on top of your connected data.

Think about the internal tools your team builds and rebuilds every year. A customer portal. A daily ops dashboard. An order status lookup for your sales team. A supplier scorecard. An inventory management view. These applications always end up the same way — someone builds a spreadsheet or a one-off report, it goes stale, and six months later someone starts over.

Stratify's application builder changes that equation entirely.

What you can build

Because Stratify is already connected to your live systems, any application you build on top of it has real data from day one — no integrations to write, no APIs to configure, no mock data to replace later.

You describe what you want to build, and Stratify generates the application logic against your actual connected data sources.

- **Simple tools:** A daily revenue summary that lands in Slack every morning. A customer lookup that pulls combined history from your ERP and CRM in one view. A purchase order status page your operations team can actually use.
- **Complex applications:** A multi-step approval workflow that routes exceptions from your ERP through a review process and writes the decision back. A supplier performance dashboard that pulls from your ERP, ShipStation, and Zendesk simultaneously. A custom sales rep portal showing pipeline, open orders, and account health in one place.
- **Internal portals:** Give specific teams or roles a purpose-built interface that shows exactly what they need — nothing more, nothing less — without giving everyone access to everything.

Why this is different from building it yourself

Traditional application development against business data is slow, expensive, and brittle. Every time a schema changes or a system gets updated, the app breaks. Someone has to maintain it. When the developer who built it leaves, it becomes a liability.



Stratify applications are built on top of a live, maintained connection layer. The integrations are already there. The security model is already there. The cross-system query capability is already there. You're building the interface, not the infrastructure — and that changes the economics of internal tooling completely.

You don't need a development team to build simple Stratify applications. If you can describe what you want, Stratify can generate it. For more complex applications with custom logic, approval flows, and multi-system write-back, Stratify provides the building blocks so your developers — or your implementation partner — can move fast without starting from scratch.

How It All Works Together

These five capabilities aren't separate products. They're a single connected platform.

- Ask a question — get a live answer from across all your connected systems
- Set an agent — monitor for it automatically on any schedule
- Get an alert — act when the condition triggers, with a human in the loop
- See the result — in your dashboard alongside everything else
- Build on it — create applications that put the right data in front of the right people



Ask. Monitor. Act. See. Build. Applied to sales, operations, finance, inventory, customer success, fulfillment — any workflow in your company where data lives in more than one place and someone is currently doing manual work to connect it.

Systems Stratify Connects

Stratify connects directly to your live systems — no sync, no warehouse, no middleware required. Current connectors include:

- ERP: Sage 100, Acumatica, NetSuite, and other SQL-based ERP platforms
- CRM: Salesforce (full SOQL support)
- eCommerce: Shopify (GraphQL)
- Fulfillment: ShipStation
- Support: Zendesk
- On-premises databases: any SQL Server database via RemoteAgent (no inbound firewall rules required)
- ODBC sources: any system accessible via ODBC, including Ajera and other industry-specific platforms
- Files: CSV, Excel, and Word documents as queryable data sources

For companies running on-premises software, Stratify's RemoteAgent is a lightweight Windows service that runs at your site and establishes an outbound-only connection to the cloud. Your database never needs to be exposed to the internet.

The Philosophy Behind the Code

There's a book I come back to every year, *The Go-Giver* by Bob Burg and John David Mann. It's a short, simple story, but it's one of the most powerful lessons on success I've ever read.

It outlines five laws that have shaped not just how I do business, but how I try to live my life:

- The Law of Value — Your true worth is determined by how much more you give in value than you take in payment.
- The Law of Compensation — Your income is determined by how many people you serve and how well you serve them.
- The Law of Influence — Your influence grows in direct proportion to how abundantly you place other people's interests first.
- The Law of Authenticity — The most valuable thing you have to offer is yourself.
- The Law of Receptivity — The key to effective giving is staying open to receiving.

I've built my career around these principles. My goal in every project is simple: deliver more value than I'm paid for. I want to create long-term partnerships built on trust, measurable outcomes, and real impact. Automation, for me, isn't about technology. It's about access. It's about empowering people to spend their time on what truly matters.

That's why when I walk into a company, show someone an automation, and see their face light up because their job just got easier — that moment matters to me more than anything else.

At the end of the day, people don't remember what you built or what you owned. They remember how you made them feel and how you made their life better, even in small ways like reducing friction in their work.

Building Systems That Work in the Real World

You might be wondering what sets my approach apart from everyone else talking about automation and AI.

To start, I don't just consult. I build. I write code, design the systems, and stay in the details until everything works the way it should.

I also bring more than 25 years of experience leading product, engineering, and infrastructure teams. I've built enterprise-grade systems that perform under pressure, including PCI DSS-compliant payment platforms that passed penetration tests and ERP integrations supporting hundreds of installations and millions of records each day.

What truly makes my approach different is how I connect technology with business strategy. I can talk code with your developers or results with your board. After nearly a quarter century as a CTO, I understand both the technical challenges and the executive priorities that drive real transformation.



That combination of hands-on engineering, deep experience, and strategic perspective is rare. And it's what ensures every solution I deliver actually works where it matters most: in the real world.

I'm not saying this to sell you something. I'm saying this because I've spent 25 years building the systems that companies run on — and I've seen what happens when those systems finally start talking to each other. People get their time back. Leaders get visibility. Teams stop doing busywork and start doing the work that actually matters.

I'm Eric Ward. I'm a computer dork who's been doing this for over 25 years. I built and exited a SaaS company. I spent my career solving the ERP integration problem from the inside. And I built Stratify because mid-market companies deserve the same data access that enterprises take for granted.

Let's talk about giving you your time back.

Connect with me on LinkedIn: [linkedin.com/in/eric-ward-greenville](https://www.linkedin.com/in/eric-ward-greenville)

About the Author

Eric Ward is the founder of Stratify and Outside The Box Solutions. He didn't just stumble into AI; he arrived here after 25 years of grinding through complex integrations. Back in 1999, Eric co-founded CIMcloud, serving as CTO for 24 years and architecting the technology for a premier B2B eCommerce platform. During that tenure, he personally designed and executed integrations with over 50 third-party systems—spanning ERPs, CRMs, and payment processors—supporting thousands of installations and millions of daily records.

He built PCI DSS-compliant infrastructure that stood up to rigorous penetration testing, owning every architectural decision for nearly a quarter-century. After his exit, Eric noticed a systemic problem: companies running a dozen disconnected systems, leaving brilliant people to bridge the gaps with manual busywork. The data existed, but the connective layer was missing. That realization led to Stratify. It's not a one-off consulting project; it's a platform built to sit on top of your existing tools to make data queryable and actionable without replacing a thing.

A graduate of Texas A&M University, Eric can be found on the water, the slopes, or the trails when he's away from his desk—or simply at home with his wife, Julie, their three boys, and their dog, Sion.

[Connect with Eric on LinkedIn](#) to learn more.

