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A checklist to help you plan and manage your next integration project

Application Integration Checklist

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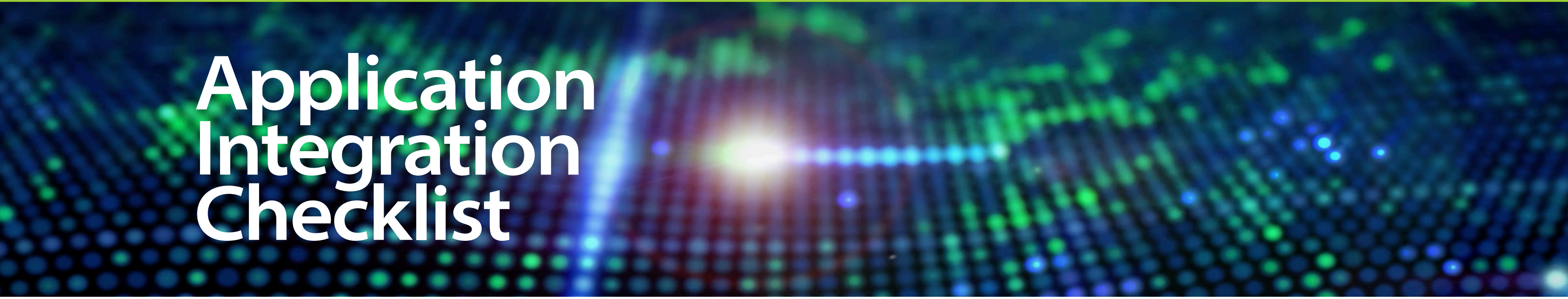

Application Integration Checklist

Without the right people, tools and techniques, integration projects can be complex. And even when you have these in place, you still need a solid plan to execute your integration successfully. To get your project off to a great start, use our Integration Checklist to be sure you cover all the bases.

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People

Every successful project starts with a great team of people.
The same is true for your integration project. It’s important to think beyond the technology requirements and ensure you have the right people involved, have goals clearly defined, and appropriate skills available.

Stakeholders

- Who are the stakeholders for the project?
- Who is the project sponsor?
- What is the overall business objective?
- Who are the owners of the apps to be integrated?
- Who owns the data?
- Who is responsible for the process(es) requiring integration?
- What are the different teams’ goals for the integration?
- Are there any goal conflicts? How will these be resolved?

Integration team

- Who is responsible for the implementation timeline?
- Who is responsible for integration configuration and build?
- Does the team need new training or skills to build the implementation?
- How will you manage changes (consider both change control processes, and tools like CI/CD)?
- Who will be responsible for the ongoing operation of the integration?

Applications

The applications and technologies you'll be integrating are the basis of your project. Take time to understand what they do and how they will work with each other. Ask yourself: what do these applications mean to different parts of the business? What impact do they have on your customers? And what does this mean for the way they'll be integrated? How might your project change the experience of how customers and staff interact with your business?

Apps and dependencies

- Are the applications on-premises or cloud-based?
- Are there other devices and technologies to be connected (e.g. IoT devices, Event streams)?
- How will the applications interact with each other?

Orchestration

- Which processes need to be integrated?
- What dependencies will exist between the processes?
- Will the processes need to be coordinated and orchestrated?
- What are the business rules for the integrated processes and workflows?

Data

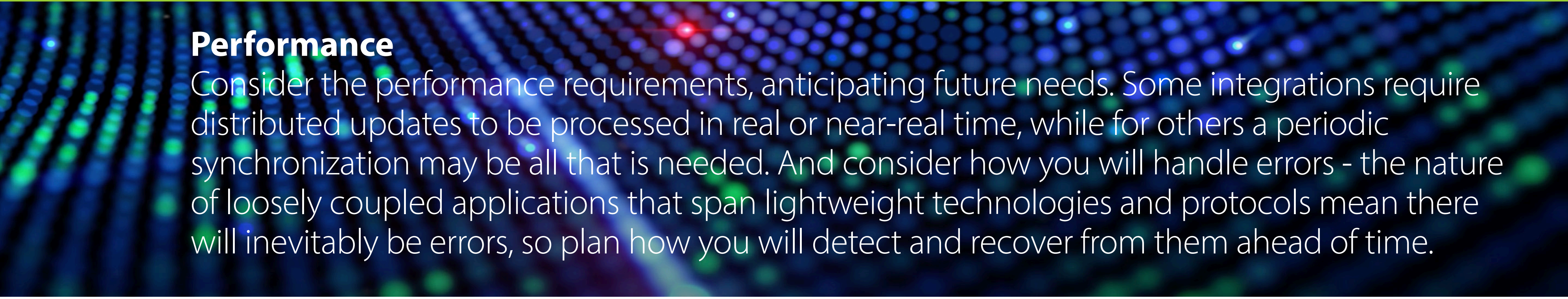
Ultimately, integrations are all about the data. Applications provide us data, and integrating two useful applications can add a lot more value than keeping data in silos. As part of your integration checklist, you'll need to determine the data that's associated with each application and how it's shared across other applications. You'll need to understand:

Structures and mapping

- For each type of data set, which application is the system of record?
- How does the data map between applications?
- Who owns the maintenance of the data sets?
- What is the quality of the data? Does it require cleaning?
- How will the data be used and managed, and does this meet compliance and security requirements?
- What is the structure of the data for each application?
- What are the data validation rules?
- Will you need to consolidate or reconcile data before integrating?

Roles, access and security

- Who has access to the relevant applications and their data?
- Who manages access to the applications and data?
- Who will have access to change, control and view the data?
- Is sensitive data (e.g. Personal Identifiable Information (PII), Payment cards, Sales data, Trade secrets) segregated and protected?
- Have all necessary data protection and privacy regulations been addressed? (e.g. GDPR, CCPA, HIPAA etc)



Performance

Consider the performance requirements, anticipating future needs. Some integrations require distributed updates to be processed in real or near-real time, while for others a periodic synchronization may be all that is needed. And consider how you will handle errors - the nature of loosely coupled applications that span lightweight technologies and protocols mean there will inevitably be errors, so plan how you will detect and recover from them ahead of time.

Operations

- What level of performance is required (consider data volumes and throughput, both now and allowing for future growth)?
- Will there be spikes in data or transaction volumes at certain times?
- How will integration performance be monitored?
- How will performance be scaled up and down if needed?
- What level of integration service availability is required?
- Will there be any SLAs for your business critical integrations?

Reliability

- How will errors be identified and rectified?
- Who is responsible for fixing errors?
- Who should be notified of errors?
- Will there be manual processes required following errors (e.g. to restart the integration?
- Investigate & correct missing transactions? Investigate & correct duplicate transactions)?
- Should you consider a platform with self-healing error detection?

Once you've answered these questions, you should be in a good place to get your integration project up and running.

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Want to make things easier next time?

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