



# Planning an Integration Guide

**A goal without a plan is just a wish. – Antoine de Saint-Exupéry**

**Your team has identified the need to integrate your systems and data but what next? Use this guide to plan a successful integration project:**

## **1. Bring the right people.**

Having the appropriate parties involved will ensure that you create a thorough project scope (more on that next), select an appropriate integration tool and all details have been considered. Bring these people to the table:

### **Project Manager**

This person will own the project and be responsible for the completion deadline. They should be technical enough to understand the requirements, highly organized and a good communicator so they can liaise between those implementing the project and the overall integration team.

### **IT Champion**

Ensure this person knows your systems in, out and upside down. They can grant Windows permissions to needed users, have access to critical passwords (like SQL!), and understand customizations of current systems. The IT champion should understand the technical components of both the data sources and destinations being used.

### **ERP/CRM Users**

These are the folks that need very specific data in the right place at the right time. They can add day-to-day thoughts on the integration process by identifying where the need lies and how a new integration process will provide overall efficiency. They can help guide which system should be the master, have a deep knowledge of business rules and processes that must be followed, and will help you consider how the data integration will affect and support day-to-day operations.

## 2. Thorough Project Scope

To start, determine what you plan to gain from the integrations. The more detailed the better. Next, consider these steps as part of your integration planning process:

- Determine your requirements – What systems need integrations and why? What challenges are you looking to solve? Build integrations to take the place of manual data entry. Replace slow, legacy migration solutions. Ensure all your systems “talk” to each other. Take your cloud data and send it to your ERP or CRM systems to ensure your data is up to date.
- Prioritize your integrations – determine what your most pressing integration needs are – that’s your stage 1. Move on to stages 2, 3, 4, etc. until you’ve prioritized each known integration.
- Determine a timeline for each stage.
  - Let the project manager step in to ensure the stages are reached.
- Determine what system will be the master (where the data will “live”).
- Consider data you want integrated, including all the transactions or steps that need to happen for those things to be created properly in the other system. Do you need to create the vendor before you can integrate invoices from your website? What happens if they are not created?
- Consider ongoing integrations, one-time integrations, data you want to run manually, and transactions that can be automated.
- Determine if you will integrate historical data.

### 3. Select a solution.

Rather than hire a developer, spend time evaluating integration tools based on your requirements and select a solution that best serves your project scope. Don't get enamored by bells and whistles and instead stick to the functionality important to the success of your project. You'll want a solution that has:

- A proven history with many thousands of users
- Intuitive user interface
- Ability to connect to cloud apps
- Templates for building integrations
- Efficient error handling
- Proven integration speed over manual data entry
- Ability to handle complex integrations and add code (if needed)
- Ability to apply additional data validations.
- Notifications (via email) of integrations

## 4. Define your QA process.

Normally a portion of the project scope, we wanted to call it out separately to highlight its importance. Your integration success hinges on your testing process. The more testing you do up front, the fewer issues you run into once you move this into live production. We recommend:

- Having a test environment that is an exact copy of your production environment.
- Start by testing a few records (think 5 or 10) and continue moving up (100+).
- Adding or using built in data validations as often the error messages are easier to address and determine what needs to change in your integration.

## 5. Get training.

Data will not move itself just because you've identified you need it in a new place! It's time to determine who will build the integrations. If you've selected the appropriate tool, your team can likely build the integrations you need – with some training. If the integrations are complex (for example: connecting to an obscure cloud-based product via web services), then you'll likely want to bring in an expert. Think about doing the following combo:

- Line up full training for your team
- Work with a consultant who can train you and serve as a resource as you build out the integrations.
- Use an expert for complex integrations.
- Ensure you have access to ongoing support

If you follow the previous steps you will avoid set-backs, delays and frustration and instead experience a successful integration project.



Ready to move forward with an integration project?  
The eOne team can help.

Contact **+1 888.319.3663** or email **[sales@eonesolutions.com](mailto:sales@eonesolutions.com)** to speak to our team about how we can assist you with a solution, training and implementation.