

# Data Integration Checklist

## A practical guide to connecting your business systems

Rapidi has helped B2B companies connect their business systems for over 30 years. This checklist captures what we've learned from hundreds of integration projects across Salesforce, Microsoft Dynamics, HubSpot, and NetSuite. Use it to plan your own integration project, avoid common mistakes, and get results faster.

### 1. Assess Your Current State

*Understand where your data lives and how it moves today*

Before you change anything, you need a clear picture of how data flows through your business today. Most companies are surprised by how many manual workarounds exist once they start mapping them. This step is about finding every place where data is entered, copied, or reconciled by hand.

- Map all systems that hold business data**  
CRM, finance, accounting, inventory, and any other tools your teams use daily
- Document how data moves between systems today**  
Include automated transfers, manual exports, email attachments, and spreadsheet workarounds
- List where teams re-enter data manually**  
Find every place where someone types the same information into two or more systems
- Identify which teams are affected**  
Sales, finance, operations, customer service, and anyone who touches shared data
- Calculate time spent on manual data tasks per week**  
Ask each team to estimate hours lost to duplicate entry, copy-paste, and reconciliation

### 2. Define Your Integration Goals

*Get clear on what you want to achieve before picking a solution*

Integration projects fail when teams jump straight to technology without agreeing on what they need. Spend time here defining which data should move, who needs it, and what triggers the transfer. Clear goals also make it much easier to measure success later.

- Decide what data needs to flow between which systems**  
Customers, orders, invoices, products, contacts, inventory levels, payment status



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 **Identify who needs access to what information, and where**

Sales teams working in CRM need finance data; finance needs order data from CRM

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 **List business events that should trigger automatic data transfers**

Examples: closed deal creates an order, new customer syncs to finance, invoice updates flow back to CRM

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 **Define what success looks like**

Time saved per week, error reduction percentage, faster quoting, improved cash collection

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### 3. Evaluate Your Technical Environment

*Know your infrastructure before you shop for a platform*

Your technical setup will shape which integration approach works best. Some companies run everything in the cloud. Others have legacy on-premise systems that need direct database connections. Understanding your environment up front prevents surprises during implementation.

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 **Confirm your deployment model: cloud, on-premise, or hybrid**

Some businesses need on-premise or hybrid setups for compliance, security, or legacy reasons

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 **Identify legacy systems that need direct database access**

Older systems may require SQL reads or other direct connections

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 **Review compliance and security requirements**

Data residency, encryption, access controls, audit trails, industry regulations

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 **Decide who will own the integration day-to-day**

Business users? IT? A mix? This affects which platform is the right fit

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### 4. Choose the Right Platform

*What to look for when comparing integration solutions*

Not all integration platforms are built the same. Some require heavy development work. Others come with pre-built templates that get you running in days. The right choice depends on your team's technical skills, your systems, and how fast you need results. Pay close attention to support quality. When something goes wrong at 4 pm on a Friday, you want real people who know your setup.

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 **No-code configuration for business users**

If it requires developers, think about whether that matches your team and budget

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 **Pre-built templates with pre-mapped fields for your scenario**

Templates for common CRM-to-finance workflows save weeks of setup time

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**Support for your deployment model**  
Cloud, on-premise, and hybrid. Make sure the platform fits your environment

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**Fast time to value**  
Can you be running in days or weeks, not months?

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**Transparent pricing with no hidden costs**  
Ask about per-record fees, connector fees, support tiers, and overage charges

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**Real, personal support from people who know your setup**  
Not just a chatbot. Ask about satisfaction scores and response times

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## 5. Clear Up Common Misconceptions

*Correct these before they slow down your project*

We hear these myths in almost every first conversation with a new customer. They come from outdated experiences with old-school integration tools that required months of custom development. Modern platforms have changed the game, but the misconceptions linger. Clearing them up early saves time and prevents decision paralysis.

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**"You need developers to integrate your systems."**  
Modern no-code platforms let business users set up and manage integrations without writing code

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**"Integration projects take months and cost a fortune."**  
Pre-built templates with pre-mapped fields can get you running in hours or days

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**"It only works if everything is in the cloud."**  
Good platforms support on-premise, cloud, and hybrid setups, including direct SQL database reads

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## 6. Plan Your Pilot

*Start small, prove the value, then expand*

The fastest way to build confidence in integration is to pick one connection, set it up, and show results. A pilot removes the guesswork. It gives your team hands-on experience with the platform and produces real numbers you can bring to leadership when it's time to expand.

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**Pick one high-impact, low-risk integration to start with**  
Example: syncing customer records between CRM and finance, or automating invoice data flow

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**Define clear success criteria before you begin**  
What will you measure? Time saved, error reduction, user satisfaction?

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- Assign an internal owner to manage and monitor**  
Someone who understands the business process and can test the results

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- Set a timeline for evaluation**  
Give the pilot 2 to 4 weeks, then review against your success criteria
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## 7. Measure and Expand

*Prove the results, then grow*

Numbers talk. Once your pilot is running, track the specific improvements: hours saved, errors avoided, faster collections. These metrics make the business case for your next integration. Most Rapid customers start with one connection and expand to three or more within the first year.

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- Track time saved on manual tasks**  
Compare hours spent before and after integration

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  - Measure reduction in data entry errors**  
Fewer duplicates, mismatches, and corrections

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  - Monitor data accuracy and consistency across systems**  
Are customer records, orders, and invoices matching up?

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  - Document cost savings**  
Staff time, error correction costs, and delayed collections

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  - Use pilot results to build the case for more integrations**  
Show leadership the numbers and propose the next connection
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## Why Rapid?

When you work with Rapid, you're not just getting an integration platform. You get 30 years of hands-on experience with the systems you run your business on, pre-built templates that map to real business processes, and personal support from a team rated five stars on major review platforms.

Ready to take the next step?

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