Checklist

Define business goals

- [ ] Document and define goals and expected benefits of integrations being implemented in a business-centric way.
- [ ] Align the planned integration's purpose with short- and long-term organization goals.
- [ ] Ensure the overview of the integration architecture, systems, and integration points is clear and understandable.
- [ ] Ensure that stakeholders have a shared understanding of the purpose and scope of the integrations that are being implemented.

Choose a platform

- [ ] Ensure the organization understands the concept of cloud versus on-premises platforms and the boundary between them.
- [ ] Plan to use either an integration middleware or messaging service.
- [ ] Ensure the integration architecture, platform, or middleware supports the expectations for monitoring, audit, notifications, and alerts.
- [ ] Ensure the integration architecture supports the expected level of security, availability, and disaster recovery.
- [ ] Ensure all components of the integration architecture support ALM and version control.

Choose a design

- [ ] Align the designs of each integration with the overall integration architecture.
- [ ] Avoid unnecessary replication and transmission of data into the solution in integration designs.
- [ ] Clearly state the options and benefits of each of the following: UI, data, process integration, and Dataverse.

Choose a pattern

- [ ] Design integrations to favor robust, asynchronous messaging-based patterns.
- [ ] Align patterns used for each integration with expectations for volumes, frequency, and service protection limitations.
- [ ] Set realistic estimates of the operating costs for services, platforms, and storage involved and be aware of how scaling affects them in the future.

Project governance

- [ ] Plan each integration for user and performance testing under realistic loads, as well as the end-to-end process leading up to the integration, across the system boundary, and after the point of integration.
- [ ] Plan for testing the end-to-end process patterns used for each integration in line with recommendations for volumes, frequency, and service protection limitations.
- [ ] Have change management activities related to integrations that reflect and support overall business goals.
- [ ] Complete the impact analysis on upstream and downstream processes.