

# SOLUTION DESIGN CHECKLIST

## **Understand business requirements**

- Gather/collect and clarify your specific business needs and goals of the solution.
  - Do you need to streamline data?
  - Do you need to manage and analyze data?
  - Are you hoping to reduce manual tasks?

## **Analyze systems landscape and complexity**

- Review your existing technologies, architecture, and existing reusable components.
- Identify your application ecosystem: on-premise or cloud.
- Identify non-functional requirements such as Process Behavior (PB) or Data Intake Patterns (DIP).

## **Map current workflows and processes**

- Visualize the end-to-end process, including integrations.
- Create a flowchart or diagram of your business process you are trying to improve with Workato.
- Identify:
  - Where data is being exchanged - integration.
  - Where data is being stored and analyzed - automation.
  - Where tasks can be automated - data.
  - Where people may be involved - interaction.

**Identify key components and moving parts**

- Separate stable components from those likely to change.
- Identify core functionality and key capabilities.
- Document limitations and roadmap: be clear about what's included and what's planned for future versions.

 **Design the logical and technical architecture**

- Design for data consistency, orchestration, and analytics.
- Map implementation patterns to software solutions.
  - Differentiate between solutions that require automation implementations versus integration implementations.
- Map architectural styles to technical solutions.

 **Plan for scalability, customization, and future enhancements.**

- Focus on designing a flexible and adaptable solution from the outset, incorporating modular components, and anticipating potential future needs.
- Design for extensibility: Use pluggable modules and configuration tables.