

# 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.