

Data Integration Readiness Checklist

A comprehensive guide to assess your business's readiness for data integration

How to Use This Checklist

Rate each item as:

-  **Ready** - Fully in place or well-defined
-  **Partially Ready** - Some work needed or partially addressed
-  **Not Ready** - Requires significant attention before proceeding

Scoring Guide:

- 80%+ Ready items: You're well-prepared for data integration
 - 60-79% Ready items: Address key gaps before starting
 - Below 60% Ready items: Focus on foundational elements first
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1. Current System Inventory

Data Sources Assessment

- ☐ We have a complete list of all systems that store business data
- ☐ We know what types of data each system contains
- ☐ We understand how data flows between our current systems
- ☐ We've identified which systems are critical vs. nice-to-have
- ☐ We know the age and condition of each system
- ☐ We have documentation for our existing software and databases

Data Quality Review

- ☐ We regularly clean and maintain our data
 - ☐ Our data has consistent formats across systems
 - ☐ We have processes to handle duplicate records
 - ☐ We know which data sources are most reliable
 - ☐ We've identified data gaps that integration could fill
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2. Business Objectives & Strategy

Goals Definition

- ☐ We've clearly defined what we want to achieve with data integration
- ☐ We have specific, measurable outcomes in mind

- ☐ We understand how integrated data will improve our business processes
- ☐ We've identified which departments will benefit most
- ☐ We have realistic timelines for seeing results

Success Metrics

- ☐ We know how we'll measure the success of data integration
 - ☐ We have baseline metrics to compare against
 - ☐ We've set specific targets for improvement
 - ☐ We understand the expected ROI timeframe
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3. Technical Infrastructure

IT Environment

- ☐ Our internet connection can handle increased data traffic
- ☐ We have adequate server capacity or cloud infrastructure
- ☐ Our network security is up to current standards
- ☐ We have reliable backup systems in place
- ☐ Our systems can handle real-time or scheduled data synchronization

Software Compatibility

- ☐ Our key systems have APIs or export capabilities
 - ☐ We know the technical limitations of our current software
 - ☐ We've confirmed that our systems can integrate with modern platforms
 - ☐ We have or can obtain necessary technical documentation
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4. Team & Resources

Internal Capabilities

- ☐ We have someone who can serve as the project champion
- ☐ Our team includes people who understand our data and processes
- ☐ We have time allocated for team members to participate in the project
- ☐ We have someone who can make technical decisions
- ☐ Our staff are open to learning new processes and tools

External Support

- ☐ We've budgeted for professional data integration services
 - ☐ We understand what level of ongoing support we'll need
 - ☐ We've researched potential integration partners or vendors
 - ☐ We have realistic expectations about timelines and costs
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5. Data Governance & Compliance

Data Management

- ☐ We have clear policies about who can access different types of data
- ☐ We understand our legal obligations for data protection (GDPR, etc.)
- ☐ We have processes for data retention and deletion
- ☐ We know how to handle sensitive or personal information
- ☐ We have audit trails for data changes

Security & Privacy

- ☐ We have strong password policies and user access controls
 - ☐ We regularly update our software and security measures
 - ☐ We have procedures for handling data breaches
 - ☐ We understand how data integration affects our security posture
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6. Budget & Timeline

Financial Planning

- ☐ We have a realistic budget for the integration project
- ☐ We've accounted for ongoing maintenance and support costs
- ☐ We understand the potential ROI and payback period
- ☐ We have contingency funds for unexpected requirements
- ☐ We've considered the cost of training and change management

Project Planning

- ☐ We have realistic expectations about project timelines
 - ☐ We can accommodate the time needed for planning and testing
 - ☐ We've identified any seasonal factors that might affect timing
 - ☐ We have flexibility to adjust timelines if needed
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7. Change Management

Organizational Readiness

- ☐ Leadership is committed to the data integration project
- ☐ We've communicated the benefits to all affected staff
- ☐ We have a plan for training users on new processes
- ☐ We're prepared for an adjustment period during implementation
- ☐ We have strategies to address resistance to change

Process Documentation

- ☐ We've documented our current business processes
 - ☐ We understand how processes will change with integrated data
 - ☐ We have plans to update procedures and training materials
 - ☐ We've identified who will be responsible for new processes
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Next Steps Based on Your Results

If You're Ready (80%+)

Congratulations! You're well-prepared for data integration. Consider:

- Getting quotes from integration specialists
- Creating a detailed project timeline
- Starting with a pilot project to test the waters

If You're Partially Ready (60-79%)

You're on the right track but should address key gaps first:

- Focus on items marked  in critical areas (Technical Infrastructure, Team & Resources)
- Consider bringing in consultants to help with planning
- Develop a preparation timeline before starting integration

If You Need Foundation Work (Below 60%)

Take time to build your foundation:

- Start with data inventory and cleanup
 - Invest in team training and process documentation
 - Consider starting with simple automation before full integration
 - Engage with a data specialist for strategic planning
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Resources & Support

Need help assessing your readiness or planning your next steps?

High Digital offers complimentary 30-minute strategy sessions to discuss your specific situation and provide personalized recommendations.

Contact us:

- Website: www.highdigital.co.uk

- Email: info@highdigital.co.uk
 - Phone: [Your phone number]
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This checklist is provided by High Digital, UK specialists in data applications for small and medium-sized businesses.