



# 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

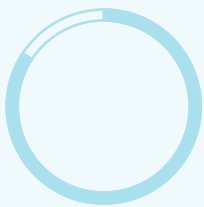
**Not Ready**



Requires significant attention before proceeding

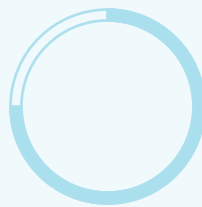
Scoring Guide:

**80-100%**



You're well-prepared for data integration

**60-79%**



Address key gaps before starting

**0-59%**



Focus on foundational elements first

# 1. Current System Inventory

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## Data Sources Assessment

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- 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

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- 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

## 2. Business Objectives & Strategy

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### Goals Definition

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- 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

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- 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

## 3. Technical Infrastructure

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### IT Environment

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- 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

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- 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

## 4. Team & Resources

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### Internal Capabilities

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- 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

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- 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

## 5. Data Governance & Compliance

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### Data Management

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- 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

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- 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

## 6. Budget & Timeline

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### Financial Planning

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- 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

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- 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

## 7. Change Management

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### Organisational Readiness

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- 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

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- 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

## How to Calculate Your Score

1. Count your  Ready items only

2. Divide by total number of checklist items (42 total)

3. Multiply by 100 for your percentage

### Example:

$30 \text{ Ready items} \div 42 \text{ total items} \times 100 = 71\% \text{ Ready}$

## 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

## Resources & Support

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### 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 personalised recommendations.

**Contact us:**

✉ [info@highdigital.co.uk](mailto:info@highdigital.co.uk)

🌐 [www.highdigital.co.uk](http://www.highdigital.co.uk)