

Integration planning workbook

Map the business events and records that connect your systems. A useful integration plan starts with ownership and purpose, then chooses the interfaces and controls.



Start here

1. Define the business event

Describe what starts the flow: an order, a payment, a stock movement or an employee update. State who needs the result and how quickly.

2. Map the record

Identify the source of record, the destination systems and the fields exchanged. Define identifiers and validation rules.

3. Design the handoff

Choose real-time or scheduled exchange based on operational needs and available interfaces. Define access and change responsibilities.

4. Plan for exceptions

Document failures, retries, duplicate handling and reconciliation. Each exception needs an owner and a visible recovery path.

5. Validate and operate

Test representative records and failure scenarios before launch. Agree monitoring, operating documentation and change review.

Questions for your team

1. Which system is authoritative for each record?

2. What happens if the destination is unavailable?

3. How will we identify duplicates and reconcile differences?

4. Who sees an error and who can resolve it?

5. Which interface changes require coordinated testing?

Next step: agree an owner, a first action and a review date. Bring your notes to Alofouq for a practical discussion.