



Must-Ask Questions For a Successful Integration Project

By Steve Cahill

B2B integration can be tough to manage. You constantly have to maneuver through business processes and IT functionality, in addition to meeting customer requirements. However, these challenges don't necessarily have to be dealt with on your own if you choose to work with a provider who can handle the on-boarding, connectivity, change management, mapping and other integration elements. Even with outsourcing, a company must be internally prepared and aligned to ensure a successful integration project.

So what are the key questions you should know the answers to in order to have a successful integration project? Whether you handle it in-house or have it managed by a service provider, here's what to ask to ensure a successful integration project:

Who is involved?

Make sure you know everyone who will be involved in this project. Nothing is worse than getting 75% complete, then encountering a show-stopping roadblock due to input from an unknown stakeholder. There are generally three to 10 stakeholders involved on a daily basis. These can be your business stakeholders, IT department, customer, customer's marketplace or outsourced integration provider, and more. Make sure it's clear who owns the integration process, and that the business and IT sides of the house are aligned with the goals and roles of those involved.

What are you trying to do?

Now that you know who will be involved, everyone needs to clearly understand the value you're trying to generate. For example, you might want to automate invoice processing for your customers, or one of your customers might be asking for a punchout-enabled catalog in order to streamline purchasing process with you. You may need only to transmit small electronic messages (e.g. purchase orders) or exchange large files (e.g. CAD drawings). This project may be time-sensitive or have "best-effort" timing. Each of these scenarios requires different technical capabilities and resource

commitments from your stakeholders. So you must clearly define the scope of the project.

What security policies or business rules are required?

Customer integration is typically more than just moving a document between two companies. Each business may have detailed business rules or workflows it needs to follow, such as tracking ID numbers or correlating information on all procurement messages. Security and compliance are also vital. What type of authentication does your company require? How do data encryption levels or compliance come into play?

Is everyone ready?

This may seem obvious, but make sure that everyone involved with the project clearly understands what's being asked of them, and is aware of the schedule. Any delays in responses from key resources could push out the "go live" date. The project owner needs to keep all internal resources on task and on schedule.

What if things don't go as planned?

As implementation work happens, things sometimes won't go according to plan. Some of these problems are easy to overcome, but others will require some flexibility. If you've leveraged an outsourced integration partner, they can be a big help—there's a high probability they've encountered a similar situation before and either already have a solution, or can recommend how best to move forward. If you don't have an outsourced integration partner, your customer may be flexible. Be prepared to adjust your priorities based on what you learn or experience.

What other business processes can I integrate?

Congratulations! You've completed your integration project. Now is the time to think about whether other business processes would be a good fit for a similar project. If your company were saving money by sending electronic invoices, perhaps implementing punchout and electronic purchase order capabilities would save even more. Be creative here: Integration partners usually provide functionality well beyond the original agreement, and you can sometimes get functionality added for a much lower cost than the initial investment.

While integration can be complex, it does not have to be rocket science. You can ensure a successful integration project by being prepared and answering the above questions before and during the process.

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