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5 Questions You Should Ask When Exploring Tech Stack Integrations Internally

1 What are the critical business processes that need to be solved for in the future state?

2 In order to understand user journeys and where/how data is captured, who needs to give us reverse demos?

3 Prior to going live, what is the amount and type of data that needs to be cleaned, de-duplicated/merged and aligned?

4 What is the desired permission & governance structure within the CRM instance?

5 How do the integrations need to function at a high level?
Which types of records need to be synced?
Which sync direction, frequency, and rules are needed?