This is a short preview of
The Buyers' Guide to Data Integration Software

Contents

Before you speak to anyone establish your needs

What are you trying to do?
- Data ingest
- Data for BI & Analytics
- API integration
- Data migration
- Data error management
- Data transformation & movement

General considerations:
- Budget?
- Number of data sources?
- Where is your data mostly located?
- Where does your data need to be?
- Future business needs?
- Data quality?

Technical considerations:
- Open source Vs commercial software?
- Cloud Vs on-premise?
- Performance Vs security?
- Visual interface Vs developer tool?
- Admin & hardware resources available/required?

Creating your vendor shortlist

How to identify appropriate vendors:
- Ask lots of questions
- What's included/not included in the price?
- Have you decided on an appropriate licensing model?
- What support is on offer?
- Will the vendor help with implementation and set-up?

Dos & don'ts:
- Do consider a proof of concept
- Do consider more than one vendor
- Don't take solution promises on face value
- Do think about current and future needs
- Don't assume all solutions/vendors are alike

Demos & evaluations:
- Do both for each shortlisted vendor
- Ensure any evaluation is a full version of the software
- Don't accept canned demos
- Test software against your specific use case
- Test the vendor, as well as the software

Who will be using the software?

User profile:
- Will the software be used by technical or business teams, or both?
- Do you want an easy to use visual too or something for developers to code in, or both?
- Is it for internal users, external consultants or a combination of both?
- Do you have experienced staff or is training required?
- Have you considered cultural factors, change management and new ways of working?

Implementation

Challenges of working with a new technical solution:
- Expect trouble
- Lean on the vendor to mitigate the risk of your project going wrong – ensure help when you need it!
- A good vendor will help design your data architecture and provide consultancy services if required
- Make sure your vendor of choice provides adequate support and documentation
- Set clear goals and expectations, establishing KPIs so you can measure success

Think about your users

Data doesn't exist in a vacuum: it's put to work by people to help solve specific business problems. That means any data integration software must make sense for the people who'll be using it. So look at the solution's features and tools, and consider their use in your organization. For example, if your IT and tech teams will be the primary users, look for software that's developer-friendly. On the other hand, if your business users will be involved in data preparation, you'll want a solution with a more user-friendly interface, yet likely to be constrained in depth of features.

Your ideal vendor will be different if your end users are people in marketing, sales, finance or legal departments who typically aren't comfortable with anything more than Word or Excel, rather than in-house developers who expect the ability to fine-tune code and create custom functions and modules. Data integration moves and prepares data for further use, so think about both users and, ideally, clear separations of their duties.

The technical ability of the people using the software will help determine, for instance, whether you'll need something simple to manage, with a visual interface only, or something that offers administrators and developers an open architecture, allowing them to customize the solution and integrate it into their own IT ecosystem.

You also need to consider not only who's going to be working with the front end of your data integration software, but also the people who are going to be maintaining the infrastructure. If your developers are going to be handing off jobs to a support team, that support team needs to understand and be able to work with the system architecture. It's important to involve these teams early in the process, so they can establish how best to integrate the new tool with existing systems and how they will manage ongoing maintenance.

Beyond these considerations, you also need to think about who's going to be evaluating any proposed solution, and who'll be helping to implement it. Some systems are easier to set up and use than others, and require less-intensive technical resources to run. Once you've thought about everything above, you'll be able to come up with a shortlist of solution providers to examine more closely. Let's look at this evaluation process next.

> "Implementing any data integration initiative is guaranteed to cause a degree of pain."

Demos and evaluations

While product demos can provide a taste of a solution's capabilities, a standard vendor demo may not be enough to help you decide if the software is right for you. Look for vendors that will tailor a demo to your specific use case – maybe even using your own test data. Do everything to steer the demo from what the vendor wants to show you to what you really need to see.

Meanwhile, a full evaluation requires a deeper dive by the people who'll actually be using the software. They should also test the software to see how it meets their real-world task and performance needs. Both the demo and the evaluation are important in helping you assess an offering's technical capabilities, as well as the vendor's attitude and response times.

Do not automatically assume rich functionality behind slick user interfaces. Take time and try to actually implement a part of your solution – don't just 'play' with the tools. Ideally, an evaluation will approximate your real-life use cases as closely as possible. Your evaluation should also include testing any server-side processes, so you can see where any errors occur – and whether notifications and error handling processes are sufficient for your requirements. This will help you visualize how the software will address your organization's specific needs and solve its specific problems. It should also give you a sense of what your support and maintenance requirements might be, and how you'll handle troubleshooting. This will enable you to know what to look for in a vendor's services as well as software.

For example, does a vendor provide all of its services in-house? Or does it work with an ecosystem of partners for support? How large is that ecosystem and what quality can you expect from those partners? If you prefer a close, personal vendor relationship, you might want to weed out the candidates that rely on third-party partners for services and support.

Finally, when getting ready to try out demos and evaluations, think not only about today's needs but tomorrow's. Which features and capabilities might be important two to five years down the road? How are your own resources and capabilities likely to change? And what might your future business needs be?

Dos and Don'ts

Do be realistic about your organization's resources and capabilities.

Weed out vendors whose services would leave you overextended or unable to cope.

Don't be afraid to acknowledge when a solution isn't right for you.

Expect the vendor to address your suitability concerns, and watch closely to see how honest they're being with you. Good vendors should be clear about what their solutions can offer, as well as what caveats to expect.

Do recognize the importance of good data.

Data integration software can't magically solve the 'garbage in' part of GIGO. But a good solution1 can help you sort out data quality issues, provide you with error management capabilities and help you fix things when they go wrong.

Don't be afraid to make vendors work during the demo and evaluation stages.

Make sure they can answer all of your questions, provide you with proofs of concept and walk you clearly through every part of their solution.

Do ask for a prolonged trial period to test drive the platform thoroughly.

Don't commit to any decisions before you understand completely how a solution will affect your business and business processes. This might use up some of your resources now, but will pay off greatly over the long term.

[1] For more on this subject, see our related paper, 'Architecting Systems For Effective Control of Bad Data,'
https://www1.cloveretl.com/whitepaper/architecting-systems-effective-control-bad-data

Read more in

The Ultimate Buyers' Guide to Data Integration Software

Read the full 14-page guide now

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