




Checklist for accelerated data onboarding


A data onboarding solution is the fastest way to safely and securely speed up your onboarding process. By carefully evaluating solutions using the checklist below, you'll have a clear understanding of how it can align with your unique needs now and in the future.


Sophisticated data cleaning and validation features are a necessity for accelerated data onboarding. These functionalities can help identify and fix inconsistencies, errors and missing values within datasets, ensuring the imported data's accuracy and reliability no matter the frequency or size of the data files. As you decide which solution is ideal for your use case, here are key capabilities you should keep in mind:


-  **1. Data collection and parsing**

Parsing is the process of taking an aggregation of information in a data file and breaking it into discrete parts. Robust parsing capabilities will allow you to transform a file into an array of discrete data and streamline the process for your users. The data onboarding solution you choose should be able to handle any file type from any source, support common formats such as CSV, JSON, XML and Excel and should offer customizable extractors to support unique data formats and requirements. Additionally it may provide an embeddable importer that allows users to import data via different methods, ensuring that it can adapt to your business's unique needs.
-  **2. Validation**

Data validation checks the data to make sure it matches an expected format or value. This feature prevents issues from occurring down the line and eliminates the need for your users to remove and re-upload data.
-  **3. Transformation**

Data transformation makes changes to data as it flows into the system to ensure it meets an expected or desired value. Rather than sending data back to users with an error message, automated data transformation can handle systematic tweaks that ensure data is usable.
-  **4. Mapping**

Mapping refers to taking previously unknown source data and matching it to a known target. Robust data mapping capabilities are critical: Without them, imports will fail when data elements like column headings don't match exactly.
-  **5. Conversion**

After the data has been collected and transformed, it needs to be converted to the desired format and transferred to the target destination. It should also be configurable to pass to targets via REST API, SQL, or Webhooks and customizable for developers in order to support any target format.
-  **6. Built-in collaboration capabilities**

Effective collaboration hinges on clear communication and shared context. Unfortunately, in any data onboarding project, there are many ways your team can become misaligned. A solution that provides a secure collaboration space for internal and external teams significantly accelerates communication cycles and eliminates unnecessary email communication and versioning issues. Access controls for different team members are just as important as the simple sharing of different parts of the data without the need to send around spreadsheets.



7. Workflow flexibility and customization options

When you're working with large files and numerous customers and team members, you not only want to be able to handle different data transfer methods, but you need to know that the right people are managing the right data at the right time. The workflows needed for importing, validating, editing and approving data are often complex and different from organization to organization, and some solutions will offer customization to accommodate your unique business needs and adapt to changing requirements and workflows within your organization.



8. Availability of AI-enhanced features

AI unlocks entirely new possibilities in the data onboarding process that can dramatically improve efficiency, user experience and data quality.

- **AI-powered:** AI can play a valuable role in streamlining and optimizing the data onboarding process with features like enhanced data mapping, highly automated data cleaning, transformation and validation and a much more powerful user experience.
- **Zero Trust AI:** Utilize the core principle of the Zero Trust AI framework, "Never trust, always verify," as the foundation for the use of AI across your data. All appropriate stakeholders must review and sign off on any AI-based changes made to your data before they're broadly applied to your data sets, data pipelines or business processes. A key component of Zero Trust AI is the ability to review changes before they are applied. You should ensure that changes are staged so that users can choose whether or not to apply them. This typically requires a simple user experience called the "data diff" view, which highlights changes and allows specific users to accept, modify or reject those changes.



9. Spotlight on security and compliance

When you're working with data, security and compliance need to be top of mind. Solutions that offer built-in security features and already comply with industry-standard regulations will reduce your risks, offering the assurance of established security measures and compliance adherence. These tools are thoroughly tested, refined and continually improved based on the experiences of numerous other businesses that have used them.



10. Other integration solutions

Data onboarding is not happening in a vacuum, it often needs to work seamlessly alongside traditional integration solutions. ETL tools and iPaaS solutions integrate structured systems and databases and manage the ongoing transfer and synchronization of data records between these systems. Data onboarding adds the power to collect and migrate highly variable data files from sources that aren't managed by a professional IT organization. Ensure that they can be implemented either on separate independent and parallel tracks but in the end work together seamlessly.



11. Reliable support and maintenance

As you consider your options, be sure to assess each vendor's support services, including response times, availability of updates and maintenance plans. Reliable support will ensure timely assistance in case of issues or concerns, minimizing disruptions in the data onboarding process.



12. Clearly demonstrated expertise

You don't know what you don't know.

You may not actually know all of the possible problems and potential risks of improper onboarding processes. Make sure the provider you choose has a deep level of experience and expertise related to data onboarding and invests in research, development and ongoing improvements to deliver robust, feature-rich products.