

Two systems, one workflow

Choose one enquiry, order or booking. Fill in the blanks and write “unknown” where needed. Use a sample record instead of real customer data.

1. Name the task and tools

Business / team:

Chosen event and what starts it:

Source tool → destination tool:

Information transferred:

2. Find the repeated work

Manual step today:

How often:

Manual minutes per event:

Label time as “measured” or “estimated”. One example does not establish a saving.

3. Identify the authoritative record and owner

Authoritative record / system:

Role responsible for checking the transfer:

Record or status that proves completion:

4. Check the connection options

Connection method: API / file transfer / unknown

Role able to authorize access:

If there is no API, check whether safe import/export is available. Do not assume access has been authorized.

5. Plan for three exceptions

What should happen if information is missing?

What should happen if the same record arrives twice?

If the destination is unavailable, who continues the work and how?

6. Define success for the first test

Result we will check:

Example: One test enquiry appears once in the destination; an incomplete enquiry remains visible to the responsible person.

Final check: Is a process owner or data source still unclear, or is a connection missing? Integration is not always the first fix.

Email the tool names and the task you want to improve to info@vmlab.io. Do not send passwords, API keys, customer lists or other personal data.

Full guide: vmlab.io/en/guides/disconnected-systems