Integration Questionnaire

# Initial Scoping Document

## Description of Partner Product

*A high level description of the partner product. Please include users of the product, the data used, and what it enables them to do.*

Insert text here.

## Key Goals of the Integration

*What goals are you hoping to achieve with the integration for the users/customers of our products when using the joint solution?*

Insert text here.

## Integration Value (Problem and Solution)

*What value is provided by the integration when it exists? What problems are we trying to solve with the integration use cases?*

Insert text here.

## Partnership Use Cases

*Please list the use cases this integration will support and describe them.*

### Use Case 1

Insert use case description here.

### Use Case 2+ (if applicable)

Insert use case description here.

## Implementation Documentation

## High Level Scoping of the Integration

*Please describe the high level scope of the integration. This should include which general data will be used, where it will be surfaced, and how it will enable the use cases described above. This should not include the specific details of the API, but rather the high level. Example Snippet: We will get the partner overlap data from Crossbeam and map that to the objects in our system using the URL. We will then take that account data in our system and add it to a list. This list will then be presented to the user so that they can…*

Insert text here.

# Design Phase Document

## Assumptions and Prerequisites

*Please detail any assumptions that are being made in the design and prerequisites for the integration. This may include items like specific tools that are required, data that must be shared, or settings that must be configured for the integration to work as planned.*

Insert text here.

## Proposed Solution and Diagrams

*Please describe the technical solution and design. This should include what calls are being made, how frequently it will run, how the data is stored/used, and any sort of mapping. This will help us verify that the approach to using Crossbeam data is being done in the highest leverage way possible and help review if there are different ways to use the API. Please also include* ***ALL*** *assumptions that this takes into account.*

Insert text here.

## API/Feature Inventory and Data Flow

*Include any relevant documentation of tools/APIs that will be used for this integration.*

[Crossbeam API](https://developers.crossbeam.com)

Insert others here.

*Which API calls will be used on each system? How will data flow from system one to the other?*

Insert text here.

## Success Criteria

*What does this look like if it is working properly? How will we test this? What are the steps to go through and the expected results of each of those steps?*

Insert text here.

## Sandbox Details

*Where will this be tested and demoed? Please also provide sandbox access for Crossbeam. How will Crossbeam access this sandbox environment?*

Insert text here.

## Concerns - Scope

*What things are we not doing in this version of the integration and why? Is this anticipated as future work or something we don’t want to do? If it’s future work, why are we delaying it and what’s the relative schedule/effort anticipated for it?*

Insert text here.

## Concerns - Security

*Are there any potential security concerns associated with this integration and the data we are using?*

Insert text here.

# Post Build Delivery Document

## Changes from Initial Scoping

*Please detail any changes that were required during the process of building from the initial scoping*

Insert text here.

## Demonstration and Sandbox

*Please include video demonstrations of the integration and any sandbox environments we can use for testing.*

Insert text here.

## Testing Results

*Please include data on the results of your testing. Please also include a video walkthrough of the working integration, including the setup, configuration, and the validation that it will work for the use cases above.*

Insert text here.

## Final API/Feature Inventory and Data Flow

*Which API calls will be used on each system? How will data flow from system one to the other? This is to ensure that your integration is scoped properly from our side for access control.*

Insert text here.

## Getting Started

*What are the steps necessary to turn this on for a customer? Which applications must be accessed, what must be turned on, and what prerequisites exist? Feel free to generate a customer getting started guide and submit with this document.*

Insert text here.

## Solutions Questions

|  |  |  |
| --- | --- | --- |
| **Category** | **Question** | **Answer** |
| Cryptography | Is your SSL certificate management a manual or automated process? |  |
| Cryptography | Does your app use HTTPS/SSL for all sensitive communications over the network? |  |
| Data Transfer | What 3rd parties will access the data, why and how? | Describe how any other systems may access or use the data |
| Data Transfer | How often will data be syncing for this integration? Will data be available on every sync? |  |
| Data Transfer | What do you expect an average call volume to be in a given day for a given customer? |  |
| Data Transfer | Do you expect peak call volume to increase for a customer on a certain cadence (hourly, daily, weekly)? What is that peak call volume, the cadence, and why more calls at that time? |  |
| Data Transfer | How do you handle scale for larger customers? |  |
| Data Transfer | Do you expect bursts of calls? If so, please describe why, how often, and how many. |  |
| Data Transfer | Please describe any anticipated high volume days or times of year? |  |
| Data Transfer | Describe the integration on-boarding data flow and any bursts that can be expected when on-boarding a new customer. Does this result in a high call volume due to an upfront bulk data import compared to the regular call volume? |  |
| Information Security | Which IT operational, security, privacy related standards, certification, and/or regulations do you comply with? (ISO-27001, HIPPA, PCI, ISO-22307, CoBIT, etc.)? |  |
| Information Security | Do you or your application support the export of personal information and customer data? If so, is this self-serve or only made available via a support request?  What is the format of the data export and does it adhere to any standard? |  |
| Information Security | Are your employees and other individuals who access or process personal data subject to a duty of confidentiality that is compliant with data protection laws? |  |
| Information Security | Does your company have a process for responding to data breaches? If so, what is it? |  |
| Information Security | Is customer data isolated in a multi-tenant environment? |  |
| Information Security | If customer data is stored in a shared environment, what protections are in place to maintain isolation and privacy of customer data? |  |
| Privacy | Is there a formal process in place to address changes to existing, new or revised privacy laws/regulations and regulatory guidance? |  |
| Privacy | Do you adhere to GDPR, CCPA, and or Canadas Privacy Act? If so, describe your process for managing PII and the right to be forgotten. |  |
| Technology | Describe the integration tech stack: |  |
| Communication | Do you disclose all vulnerabilities that affect your software? |  |
| Communication | Do you have an easily discoverable way for external parties to report security vulnerabilities? |  |
| Communication | What technical guidance do you provide to your customers about vulnerabilities, including how they could be exploited, how they are currently being exploited, and how to mitigate? |  |
| Data | Describe how customer data is imported and exported from the Platform |  |
| Data | Can the customer extract all of their data if they decide to terminate business at a certain point? How will the data be extracted? |  |
| Privacy | Please attach or provide the URL to your Privacy Policy & Terms of Service. |  |