

INTEGRATION OVERVIEW

Connecting your existing systems to lifecycle control

Lifecycle OS works with the systems services organizations already depend on - CRM, PSA, ERP, ITSM, planning, reporting, and delivery platforms - to organize the data required for controlled execution across the full services lifecycle.

Purpose

Most services organizations already have the right data, but it is fragmented across sales, finance, delivery, support, and operations. Lifecycle OS adds a lifecycle-native control layer that arranges source-system data around the decisions teams need to make earlier.

Integration principles

- Start outside production wherever possible using sandbox, development, or test environments.
- Use read-only access by default to reduce operational risk and protect source systems.
- Map data to defined lifecycle use cases such as readiness, acceptance, delivery governance, and learning.
- Preserve source-system authority while creating cross-functional lifecycle visibility.

WHAT LIFECYCLE OS ADDS

Data arranged for each operating use case

- Opportunity readiness and client intent clarity
- Commercial acceptance across price, scope, margin, and authority
- Delivery governance using project, risk, staffing, and milestone signals
- Executive visibility into performance, health, and future outcomes
- Pattern reuse and lifecycle learning after delivery completion

COMMON INTEGRATION CATEGORIES

CRM	PSA / ERP	ITSM	Planning & Reporting
Opportunity, account, customer, stage, seller-owned context, and client intent signals.	Project, resource, effort, cost, price, margin, billing, forecast, and delivery execution data.	Request, incident, change, asset, service, operational health, and recurring work signals.	Executive dashboards, utilization models, forecasts, portfolio views, and performance metrics.
Preserve intent from opportunity through execution.	Support commercial acceptance and margin control.	Connect service signals to delivery learning.	Turn reporting outputs into earlier lifecycle decisions.

RECOMMENDED INTEGRATION PROCESS

01 Discover Confirm systems, data owners, access model, and target use cases.	02 Map Identify fields, relationships, data quality, and lifecycle meaning.	03 Validate Use non-production environments and read-only access where possible.	04 Configure Arrange data into views, gates, patterns, and operating workflows.	05 Expand Add use cases only after validation and security review.
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Expected benefits

- Connect client intent to delivery execution
- Reduce manual handoffs across sales, finance, delivery, and operations
- Improve deal readiness before work begins
- Create clearer authority gates for price, scope, delivery, and governance
- Turn completed delivery into reusable learning

Security and access posture

- Read-only first unless an approved write-back use case is required
- Least-privilege permissions aligned to customer policy
- Customer environment, API, and data access constraints respected
- Production changes only after validation and approval

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Lifecycle OS gives services organizations a controlled way to connect existing systems, arrange lifecycle data, and drive better decisions earlier.

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