

B2B Managed Services checklist and priorities

Use this checklist as a support tool for choosing a B2B Managed Services provider

Outsourcing a B2B integration program requires an ‘apples to apples’ comparison when evaluating B2B Managed Services vendors. Finding a reliable partner to manage your day-to-day B2B operations that onboards trading partners anywhere in the world, maps between any document

format, integrates to backend enterprise systems, and offers 24/7 ‘follow the sun’ support can be a challenge. The following checklist is intended to provide an overview of the key components/features to evaluate B2B Managed Services providers, including but certainly not limited to

B2B Managed Services		OpenText	Other Provider	Priority: L, M, H, N/A
People				
Trading Partner Management				
Trading partner onboarding	Does the vendor provide dedicated resources to connect new suppliers to the outsourced B2B platform?	✓		
Testing and implementation	Does the vendor offer to test connectivity with new trading partners and ensure documents can be exchanged seamlessly?	✓		
Daily reporting	Does the vendor provide any feedback mechanisms to ensure there are no issues with onboarding new trading partners?	✓		
Technical Support				
24x7 helpdesk	Are the support capabilities 24x7x365 days per year so that problems can be resolved quickly?	✓		
Change management	If changes need to be made to maps or communication protocol setups, does the vendor work to a predefined process to ensure changes can be applied without affecting the rest of the B2B environment?	✓		
Proactive error alerting and reporting	Does the vendor have processes in place to monitor transactions to ensure they are exchanged correctly and in a timely manner, and will the vendor proactively notify of any issues?	✓		
Data reprocessing	Can the vendor provide resources to re-enter or rework information if necessary?	✓		
Industry-specific support capabilities	Does the vendor provide a dedicated team that understands the needs of a specific industry, such as automotive, and can respond quickly so as not to affect production environments?	✓		

Process		OpenText	Other Provider	Priority: L, M, H, N/A
B2B Program Management				
Dedicated project manager	Does the vendor offer a dedicated project manager for the implementation of the B2B environment and manage the ongoing needs of the trading partner community?	✓		
Regular status meetings	Does the vendor initiate regular status meetings relating to the day-to-day deployment of the B2B platform?	✓		
Six Sigma process methodology	Does the vendor use established and well-known processes to manage the deployment of the B2B platform?	✓		
Visibility and Reporting				
Event/Non-Event alerting	Does the vendor offer real-time alerting capability to notify of a particular activity/situation or when, for example, a document translation does not take place?	✓		
24/7 functional acknowledgement tracking and notification	Does the vendor report on functional acknowledgements to ensure transactions are being exchanged correctly?	✓		
Service-Level Management	Does the vendor offer a service level management process to monitor network availability? And if so, is the service level equal to or greater than 99.95 percent?	✓		
Trading partner scorecarding	Can the vendor measure trading partner performance through a series of out of the box KPIs that can be presented in an executive dashboard?	✓		
Community Management				
Centralized business partner directory	Does the vendor offer a means to manage supplier contact information in a central database, for example, contact addresses, email and telephone details?	✓		
Self-Service profile maintenance	Does the vendor provide a solution that allows trading partners to manage their own contact information?	✓		
Automated partner registration workflow	Does the vendor offer a workflow capability to manage trading partner registrations? Are configurable workflows available to ensure that all required information is captured?	✓		
Mapping and Translation				
Map design and development	Does the vendor offer a dedicated team to support the creation and ongoing management of the maps?	✓		
Canonical map library	Does the vendor offer a set of off-the-shelf canonical maps to support different business processes and industry requirements?	✓		
Any to any data translation	Does the vendor provide the ability to map to any type of document format, including XML based standards?	✓		
24-hour maintenance and emergency map repair	Does the vendor offer services to correct maps if errors are found?	✓		
Network-Based translation	Does the vendor offer on network-based translation rather than via on-premises-based software?	✓		
24-hour maintenance and emergency map repair	Does the vendor provide a means to capture, monitor and display compliance-related information?	✓		

Technology		OpenText	Other Provider	Priority: L, M, H, N/A
Worldwide Infrastructure				
Global B2B network	Does the vendor's B2B network use local/regional data centers across all the main geographical regions, such as North/South America, Europe and Asia Pacific?	✓		
World-Class Data Centers				
Secure backup and two-year data archiving	Does the vendor ensure that data is securely backed up and does it offer a minimum of two years data retention?	✓		
Logical and physical security	Does the vendor offer robust logical and physical security of its data center environment?	✓		
High Availability and disaster recovery	Does the vendor offer a highly available infrastructure with disaster recovery capabilities?	✓		
Data center type	Tier1/2, single site, backup monitoring	n/a		
	Tier3, multi-site in same region	n/a		
	Tier4, multi-site in multi-region	✓		
IP Comms Support				
Basic support	Does the vendor support all of the following basic communications protocols? For example, AS2, FTP, SFTP, FTPS, HTTPS.	✓		
Advanced support	Does the vendor support all of the following communications protocols? For example, MQ, WebServices, AS1, AS3, AS4, OFTP, OFTP2, Zengin, EBICS.	✓		
Legacy Comms Support				
Advanced support	Does the vendor support all of the following communications protocols? For example, Async, Bisync, X.400, SNA, LU6.2	✓		
Enterprise Application Adapters				
Basic support	Does the vendor offer adapters to key ERP systems? For example, SAP® (ALE), SAP (FTP), SAP PI, Oracle®	✓		
Intermediate support	Does the vendor offer adaptors to mid-market ERP systems? For example, Microsoft Dynamics®, Infor® ERP, QAD®	✓		
Advanced support	Does the vendor integrate to any other enterprise systems? For example, Warehouse Management System, Transportation Management System, Treasury Workstation	✓		
SMB Enablement				
Availability of B2B enablement tools	Does the vendor offer a range of B2B enablement tools to ensure that any trading partner, irrespective of size or technical capability. Can it exchange B2B documents electronically, for example, web forms, fax to EDI, fax to mail, Microsoft® Office adapters, accounting package integration, printer drivers?	✓		
ERP Integration Expertise				
Support for SAP IDocs	Does the vendor provide translation of B2B documents into SAP IDoc format?	✓		
Direct integration to SAP	Does the vendor offer direct integration between its B2B solution and a SAP-based ERP environment?	✓		
Integration support for other ERP vendors	Does the vendor offer integration to other ERP vendors? For example, Oracle, JD Edwards, QAD, Microsoft Dynamics® AX.	✓		

Technology continued		OpenText	Other Provider	Priority: L, M, H, N/A
Transaction Visibility				
Transaction-Level visibility	Does the vendor offer a portal environment or mobile app to allow individual transactions to be monitored?	✓		
Analytics-Based Transaction Reporting				
Support for transaction-based analytics	Does the vendor offer a dedicated cloud-based infrastructure for transaction archiving and analytics-based reporting?	✓		
Reporting on business metrics	Can the vendor measure business type metrics, for example, invoice accuracy, ASN timeliness, trading partner spend?	✓		
Reporting on operational metrics	Can the vendor measure operational type metrics, for example, transactions by type and transaction volumes by partner?	✓		
Community Management				
Visual representation of a trading partner community	Does the vendor offer a visual way to map out a community of trading partners?	✓		
Trading Partner Onboarding				
Auto-provisioning of trading partners	Does the vendor offer an automated way to onboard a trading partner community?	✓		
Notifications				
Business event notifications	Does the vendor offer the ability to send notifications according to certain business rules or conditions	✓		
Vendor Information		OpenText	Other Provider	Priority: L, M, H, N/A
Industry Presence				
Number of B2B Managed Services customers	How many customers does the vendor serve?	>900		
Industry support	Does the vendor support customers in all of the following industries, retail, CPG, automotive, high tech, industrial, financial services, healthcare, pharmaceutical?	✓		
Industry Analyst Validation				
External analyst validation	Does the vendor have positive feedback from key industry analysts, such as Gartner, Forrester and IDC?	✓		
Company Financial Health				
Financial performance	Is the vendor's B2B outsourcing revenue increasing or decreasing on an annual basis?	Increasing		
Strategic Partnerships				
Third-Party partnerships	Does the vendor have any strategic alliances to push its outsourced solution further into the market?	✓		