How to Rapidly Onboard Ecosystem Partners and Applications

Why slow, complex onboarding processes cost you customers, and critical business revenue
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About This White Paper

One of the first steps in establishing a meaningful business relationship is getting the partner onboarded. While there’s the relational, “people” aspect of a new partnership that requires human introductions, collaboration, and all the necessary documentation, it’s the underlying technology aspect that drives the fate of the partnership.

The easy exchange of digital data drives today’s business relationships, and your company’s ability to quickly connect a partner’s systems and applications – and successfully interact – is the difference between a thriving business and a failing one. Additionally, how customers rate their onboarding experience with you can have a huge effect on your future revenue potential.

This white paper discusses the benefits of and best practices for successful ecosystem onboarding, which includes the ability to rapidly establish new B2B partner relationships as well as implement new business applications, and the important role integration plays in streamlining those processes and driving revenue.

KEY TAKEAWAYS

1. Business growth depends on the ability and agility to accommodate changing ecosystem dynamics.

2. Slow ecosystem onboarding processes will drastically limit the pace of growth.

3. Increased visibility into data processes across the entire ecosystem reduces exposure to risk.

4. Adding new partners and applications with unique requirements takes technology.
The Importance of Onboarding

Whether it’s the latest iPad or a new riding lawn mower, how much your opinion of a product or service in part depends upon how quickly you can get it up and running, and the ability to quickly start using something you’ve invested in can have a significant effect on your relationship with that company.

Would you be comfortable with other Apple products if it wasn’t easy to surf the web or stream TV shows on an iPad? If you couldn’t cut the grass in time for this weekend’s neighborhood barbecue, how soon would you call a lawn service to do the job?

Organizations today, aware of the impacts of digital disruption, are attempting to perfect the early stages of their customer journey. Following successful acquisition, onboarding is a milestone that differentiates outstanding organizations from simply good ones, reinforcing their brand, increasing customer retention, and propelling growth. Improving onboarding requires the underlying technological framework to quickly add new partners and applications, deploy products and services with ease, while ensuring an elegant and trustworthy user experience.

“(Customer) journeys can be long, stretching across multiple channels and touchpoints, and often lasting days or weeks. Bringing a new customer on board is a classic example.”

How might your customers describe their onboarding experiences with your business? If descriptors like slow, complicated, or challenging surface, you might have an onboarding problem.

Companies face crippling business challenges if they maintain slow onboarding processes, and the impact includes:

- Risk of SLA non-compliance and possible chargebacks
- Jeopardizing existing relationships with partners
- Reductions in new sales and revenue opportunities
- Delays in application time to value
Just how much will partner onboarding delays cost you? That depends on various factors, including lost business, any manual troubleshooting efforts, and potential SLA fines. But consider it another way: how much money would you lose every week from not having your product on Walmart shelves? Or, what if you couldn’t bring on a transportation provider to get added shipping capacity for the holiday rush? And what would it cost you if potential customers learned of your poor onboarding processes and decided to take their business elsewhere?

There’s a reason Apple delivers its products fully charged and ready to use right out of the box, and it’s because the company understands the importance of the experience. Every modern company can learn something from designing the “let’s get started” experience to be as easy as possible.

The fact is, your ability to generate revenue and support end-to-end business flows depends on how quickly you can begin (and sustain) successful relationships with your customers, trading partners, and technologies. But given companies’ varying format and protocol requirements, the rapid rise of the cloud, and the ubiquity of SaaS applications, very few businesses have all the tools to efficiently meet every data requirement to streamline their onboarding processes.

Here’s how your business can enable rapid ecosystem onboarding to start its important relationships on the right foot.
The Onboarding Challenge

When we talk about ecosystem onboarding, we are talking about the ability to connect your internal systems to external customer, vendor, or supplier systems to share and exchange data. This entails integrating the EDI (and non-EDI) technologies your trading partners use for data exchange but also includes deploying new on-premise and cloud-based applications.

The challenge is that there’s just little in the way of a universal connection method, the way we might plug an appliance or device into any wall outlet in the house. Over time, any business will accumulate various systems, technologies, and processes to run their operations, and all these disparate solutions cannot natively communicate with one another. Additionally, the aging IT infrastructure powering a business may not support newer integrations with SaaS solutions like Salesforce or cloud-based storage repositories like Amazon S3.

“Platforms that allow digital players to move easily across industry and sector borders are destroying the traditional model with its familiar lines of sight.”

It’s why so many organizations just defaulted to manually building integrations for a trading partner. But successfully building one partner integration in no way makes it useful for the next one. The same investment of time, resources, and skills is necessarily repeated for the next trading partner, and if something in any of these partner profile or configuration should change in the future, your IT teams would have to update each one individually. It’s an unscalable and wholly unmanageable process that’s not suited for today’s digital business landscape, where agility is king.

Doing global business today, then, burdens your company with the monumental task of supporting the ways all your partners and customers want to digitally interact. Fortunately, these outdated, manual approaches can be eliminated with advanced integration solutions, which provide the tools and capabilities to automate complex ecosystem onboarding processes.
Root Causes of Slow Ecosystem Onboarding

Custom coding:
As ecosystems grow, integrations become more diverse and difficult to manage.

Generic tooling:
Lack of B2B capabilities in pure-play iPaaS solutions make it hard to scale beyond initial use cases.

Poor visibility:
Homegrown and custom-coded integrations lack end-to-end governance and offer limited visibility.

Poor outsourcing:
Offloading integration is OK, but your priorities may not be the same as your service provider’s, particularly when it comes to issue resolution and change management.

Limited skillsets:
Integration competency is critical. The skillset is refined and increasingly competitive to find, and maybe more importantly, retain.
Best Practices for Partner Onboarding

Trading partner onboarding comprises the efforts required to get a new trading partner connected faster. Onboarding typically refers to configuring a partner’s EDI profile and building the appropriate maps, but more commonly extends beyond EDI use cases as well.

If you think about the onboarding processes for hiring new employees in your company, it’s a joint effort among human resources, IT, and the respective supervisor to get them computers and building keycards, administer their technology accounts and passwords, file their payroll and benefits forms, and show them around the office. It’s a multi-part process that requires attention to detail so they can start being a productive teammate sooner than later.

Similarly, when an automotive manufacturer signs a new transportation and logistics partner for vehicle shipping or a cereal maker begins selling into Walmart, the onboarding process sets the tone for the relationship.

Inefficiencies in partner onboarding can jeopardize important sales opportunities and cost your business revenue, and poorly managed partner onboarding can put existing relationships at risk if data and standards aren’t implemented correctly. To enable better onboarding, then, businesses require multi-protocol support, pre-built project templates, and enhanced visibility.

Thirty percent of organizations surveyed say modernizing B2B integrations between partners and internal systems will help drive more value to their internal and partner ecosystems.

– Cleo Market Research
Symptoms of Poor Trading Partner Onboarding

- You cannot easily accept and route partner data.
- You have customized integrations that are difficult to manage, maintain, and re-use.
- You’ve outsourced integration, but your service providers are unresponsive and expensive.
- Your customer attrition rate continues to increase.

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PRACTICE 1: You Must Support Multiple Protocols

Challenge: You may have AS2, but a new partner might request SFTP or HTTPs. If your platform does not already provide it, you may have to buy a separate piece of software to support that one trading partner. And it will happen again and when future partners other protocols.

Solution: Upgrade to a single integration platform that supports all the advanced protocols you need now and in the future.* Additionally, the platform should provide a library of pre-built connectors to major trading hubs so the heavy technological lifting is already done for you.

* Wait, What Protocols?
How do you know whether you’ll need different communication protocols down the road? You might have an idea based on your industry and traditional data needs, but realistically, you won’t know for sure. If your organization has any growth ambitions, arm yourself with a platform that natively supports the broadest swath of secure data protocols, including AS2, AS3, AS4, FTPs, SFTP, HTTP and HTTPs, OFTP and OFTP2, MLLP, ebMS 2.0, and SOAP and RESTful Web Services, among others. That way, you’ll never have to worry about how you’ll onboard a new partner later.

KEY TAKEAWAYS

1. Unlock any communication protocol whenever you need it, with no additional costs.

2. Don’t reinvent the wheel; leverage proven pre-configured connectors and templates.

3. Know whether your new trading partner relationships are at risk.

PRACTICE 2: You Need Pre-Built Project Templates

Challenge: Limited data transformation capabilities likely means you must customize integrations and cannot easily re-use them. This takes a hefty amount of manual mapping that’s time-intensive and laborious with just a few trading partners, let alone hundreds or thousands.

Solution: Leverage data transformation tools that enable the reuse of partner profiles and automate the data migration from the partner system to yours. When you can automatically generate and customize integration projects, you can quickly build out even complex data transformations.

PRACTICE 3: You Require Expanded Visibility

Challenge: Visibility is key to maintaining healthy trading partner relationships during and after onboarding. Data visibility delivered via monitoring, reporting, and alert notifications keeps key stakeholders tied into critical transactions and provide capabilities for faster issue resolution, but one-off, decentralized integrations cannot provide such comprehensive reporting tools.

Solution: Next-generation integration tooling provides real-time visibility via customizable dashboards, and such technologies deliver real-time monitoring and reporting to alert stakeholders of any data challenges with their most important business relationships. Such transparency forms the basis of insight that drive operational efficiency and process improvement.
Common Practices for Application Onboarding

Ecosystems consist of a variety of people and partners, but they also include applications within your business network. As such, bringing on new applications that support core business processes also demands onboarding capabilities. Much like trading partner onboarding, onboarding applications with disparate data sources often requires numerous development, configuration, and testing processes to enable seamless integration into your IT infrastructure.

And the onboarding processes are extremely important. Companies that bring on enterprise-grade ERP applications like NetSuite or EMR systems from Epic are often making multimillion-dollar investments and must support those investments through successful onboarding and integration.

There are three common approaches to application onboarding, and the choice in approach often directly reflects the culture of integration within the company.

“A fast client onboarding process creates a positive first impression and will increase the chance of your customer choosing you over the alternative.”

PRACTICE 1:
Build It

This resource-intensive approach provides organizations with a proprietary, custom application that they control and integrate right into their stacks. Lots of companies do this today because they want to completely own the solution and tailor it to their needs. However, coding and maintaining a proprietary solution to basically integrate an application is a massive undertaking and requires specific development skills, and there’s no guarantee it’ll even work the way the business requires or be sustainable over time. Additionally, you’ll have to support this custom code until you stop using it.

Take a common use case of selling products on a digital marketplace. If you’re building an e-commerce application to integrate into an Amazon Marketplace storefront, there is an intensive and potentially lengthy certification process before you can deploy, which increases the timeline and pushes out your time to value. Plus, these standards change over time, so if Amazon releases a new API, the onus is on you to update your code as well.

Given the extensive resources required, such a siloed approach is heavily tied into skills and bandwidth and usually is reserved for large enterprises.

CONSIDER THIS

1. Is committing the time and resources to build and control your own integrated application worth it?

2. Shouldn’t your developers build apps core to your business, rather than complex API-based integrations?

3. Using prebuilt integration connectors is the fastest way to onboard an application and the most business-sensible way to integrate.
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PRACTICE 2: Use an API

Most cloud applications provide REST APIs for communication. If you have developers to unleash on those raw APIs, they can build API-based integrations. While initial costs are usually low since they are internal resources, building these integrations takes time.

Even a lightweight API might take two to three weeks to code out and test. It’s still a project to accommodate a few more data flows for a medium-level API, which may require three to four weeks to build. A complex integration – the Amazon Marketplace API, for instance, has 100 variables in one integration to accurately represent a single product – further prolongs time to value.

Those API-centric applications also are constantly being developed and maintained, but now you own the integration maintenance permanently. So, any changes Amazon makes to the API means your development teams are on the hook to stay current and add in new functionality. Your developers also would be required to implement all the latest security standards, which are constantly evolving and vary greatly between systems and APIs you’re calling.

Further, developers come and go. If they make it and leave your company, other developers may not know why they designed it a certain way or the work may not be well-documented. And when you run into that scenario and need help with troubleshooting, there is no one to call since the code isn’t supported by a vendor.
PRACTICE 3: Use a Connector

Using pre-built application connectors as part of an integration platform may take a little more upfront investment on the software side, but configuring an application using one of these connectors usually takes less than two hours upfront and around 16 hours to orchestrate even the most complex business processes on the back side. So instead of two to three weeks, organizations taking the connector approach can get the application up and running in less than a day and get going building that digital store, selling on Amazon, or selling directly on Shopify, for example, delivering an immediate return on investment.

This approach also means maintenance and upkeep is owned by the connector provider. Thus, your speed to value is fastest, your opportunity cost is the least, and the need for dedicated on-site skills requirements are the lowest, delivering integration ability, agility, and adaptability that’s impossible with the other approaches. Instead of the “how the heck are we going to integrate this?” angst hovering over every new solution deployment, you can focus on your business strategy.

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Legacy Onboarding Processes

While growth can ramp new customer acquisition, adding multiple new partners and suppliers and new business strategies calls for new applications. If IT has to custom code, configure, test, and maintain new integrations for each additional trading partner and application connection, it extends the time to value, pushes out ROI, and can be detrimental to business relationships.

Modern Onboarding Processes

New partners are added in half the time when your integration layer provides automated onboarding, and data transformation and data orchestration processes. New applications also can be integrated in less than a day with pre-built integration connectors that support your core business systems.
More than 60 percent of IT decision makers say customized partner requirements for new business flows take too long to implement.

– Cleo Market Research

What You Need to Improve Onboarding

To successfully improve partner and application onboarding processes, organizations require:

**Collaboration:** With tools that enable a truly interactive onboarding process

**Automation:** Where reusable integration patterns and templates accelerate onboarding

**Advanced:** Technology, including access to next-generation integration tooling with real-time visibility and governance

**Expertise:** To know when to outsource heavy onboarding processes like mapping and still maintain control

**Intelligence:** To leverage advanced integration technology and the knowledge to streamline integrations

An ecosystem-driven integration solution with community management features prioritizes your business relationships and significantly reduces the time it takes to bring on new trading partners, which accelerates time to revenue and improves those partnerships. The same solution also must provide application connectors to achieve faster time to value for your order-to-cash, procure-to-pay, and plan-to-produce processes, the ones that generate business revenue.
IT and Business Benefits

Modernized onboarding processes better enable your business ecosystem.

<table>
<thead>
<tr>
<th>Expanded Integration</th>
<th>Business Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept any data type</td>
<td>Comply with every SLA</td>
</tr>
<tr>
<td>Seamlessly route data</td>
<td>Improve your vendor scorecard</td>
</tr>
<tr>
<td>Securely move data</td>
<td>Increase scalability</td>
</tr>
<tr>
<td>Access real-time data visibility</td>
<td>Gain business intelligence</td>
</tr>
</tbody>
</table>

Better onboarding also means more opportunities for business expansion.

<table>
<thead>
<tr>
<th>Faster Time to Revenue</th>
<th>Operational Excellence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Say “yes” to new business opportunities</td>
<td>Eliminate integration bottlenecks</td>
</tr>
<tr>
<td></td>
<td>that prevent partner transactions</td>
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<tr>
<td>More flexibly handle partner requests</td>
<td>Easily collaborate and share</td>
</tr>
<tr>
<td></td>
<td>information across the organization</td>
</tr>
<tr>
<td>Become more competitive</td>
<td>Remove compromise between having to</td>
</tr>
<tr>
<td></td>
<td>choose speed over visibility and</td>
</tr>
<tr>
<td></td>
<td>governance</td>
</tr>
<tr>
<td>Offer more services to customers</td>
<td>Reduce the risk of costly errors and</td>
</tr>
<tr>
<td></td>
<td>maintenance</td>
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</tbody>
</table>
The Modern Way to Onboard

When businesses can add, remove, and alter a data exchange or partner configuration to respond to evolving business requirements, they enhance their agility and responsiveness.

Cleo offers rapid onboarding technologies for EDI and non-EDI data routing as well as the connectors to integrate any application without additional coding. Cleo Integration Cloud prioritizes speed and automation in partner onboarding, so you can eliminate the manual tasks and start generating revenue faster.

How fast can you onboard new partners and applications with Cleo Integration Cloud?

Trading partner setup for data movement:
- Minutes

Trading partner setup for data transformation (EDI/XML):
- First map: 16 hours
- Each subsequent map: 2 hours or less

Protocol setup:
- 2 hours or less

Application setup:
- 2 hours or less to configure
- 16 hours or less to establish and automate the business process

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$100,000 A YEAR IN SAVINGS

“Maximum value for our business”: O’Rourke Sales Company automated a four-step X12 conversion and expedited its trading partner onboarding process by weeks. The fulfillment and distribution company saved weeks onboarding every new partner and $100,000 a year in fees.

READ THE FULL CASE STUDY
There’s no other integration solution on the market that offers a complete set of tools and capabilities for onboarding and managing technology relationships from a single platform.

**Cleo Integration Cloud comes stocked with:**

1. **Automated onboarding tools:**
   So you can leverage schema, map, and business process re-usability

2. **Automated transformation:**
   So you can create automated processes to transform any data file type

3. **Pre-built B2B connectors:**
   So you have a repository of hundreds of preconfigured, ready-to-deploy communication templates to connect faster

4. **Rich APIs and application connectors:**
   So you can accelerate delivery of custom integrations

5. **End-to-end visibility:**
   So you can maintain SLA compliance with real-time views of all data exchanges

**5 BENEFITS OF CLEO INTEGRATION CLOUD**

1. Say “yes” to virtually any business partner or ecosystem integration need
2. Improve time-to-value and deliver faster ROI on your integration initiatives
3. Make your organization easier to do business with
4. Enhance your ability to be more responsive to changing business needs
5. Provide better customer experiences by streamlining operational data flows
Conclusions

Strong business relationships add value to your company. Ecosystem onboarding is the process by which organizations bring on new trading partners, systems, and applications. They all require a certain amount of configuration and integration, but the difference between a thriving organization with trustworthy relationships and a wavering one with partnership troubles is the speed with which they can execute these vital onboarding processes.

When you consider the growing number of technologies and formats a business must support across thousands of customers, suppliers, and partners, you couldn’t possibly onboard and manage them in an efficient way. By reducing manual intervention in onboarding partners and applications, you reduce the chances for error, expedite business gains, and measurably improve your ROI.

Time to value plays a critical role in boosting the bottom line for the modern enterprise, and the faster organizations can onboard the applications and partnerships that drive and directly affect their cashflow, the more sustainable value they will realize.

Visit us online at www.cleo.com

‘JUST MAKES OUR LIVES EASIER’

“Customers tell us, we’ve never had connections set up this fast before”: With Hogan’s transportation logistics business rapidly growing and new partners coming onboard every day, the power to clone mapping templates for faster onboarding goes a long way with Hogan’s clients.

READ THE FULL CASE STUDY

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