IBM Partner Engagement Manager simplifies trading partner onboarding

Realizing positive relationships with trading partner communities

Ovum view

Summary

Sluggish trading partner onboarding and limited control and visibility into processes impacting trading partner relationships have hindered enterprises from realizing positive, collaborative relationships with their trading partner communities, a factor that was supposed to be a key value driver for B2B integration. Digitalization is driving major changes in partner and customer expectations, and enterprises can no longer rely on largely manual onboarding processes and discrete tools to somehow onboard trading partners and execute B2B transactions. IT is hard-pressed to "do more with less" and focus on more strategic business-IT initiatives. LOB user enablement via self-service and an easy to use configuration-driven user interface (UI) is therefore a key imperative for enterprises. IBM Partner Engagement Manager (PEM) addresses core, recurring issues that enterprises have faced in onboarding trading partners and managing partner relationships via traditional approaches and tools.

IBM PEM addresses several pain points associated with trading partner onboarding and relationship management

Results from a recent Ovum B2B integration survey reveal that enterprises take around 23 days on average to onboard a new trading partner. Moreover, about 40% of respondent enterprises take more than 30 days to onboard a new trading partner. This is obviously a limiting factor for enterprises that need to onboard dozens to hundreds of trading partners and customers every month. Sluggish trading partner onboarding can certainly be the difference between winning a contract or letting it slip away to the competition. Trading partner onboarding with legacy B2B/EDI solutions is a complex and cumbersome process without much if any automation. This in turn increases time to market and can lead to missed revenue opportunities. About 53% of respondent enterprises cited a lack of support for rapid trading partner onboarding as a main concern with their existing B2B integration solution.

According to the survey results, over 50% of respondent enterprises need to support and implement changes in trading partner agreements, the nature and privileges of partner relationships, and translation requirements and processes. Enterprises relying on manual and ad hoc processes, and disjointed tools for connecting and managing relationship with trading partners, frequently struggle to implement changes and updates in an agile manner. These enterprises suffer from onboarding backlogs and manual, time-consuming errors, even after significant investment in terms of the proposition of maintaining dedicated resources for trading partner onboarding and relationship management.

Over 53% of respondent enterprises cited a lack of visibility into trading partner relationships as a main concern with the existing B2B integration solution. What enterprises need is a 360-degree view of trading partner relationships, with granular insights into operational performance and the ability to conduct risk assessment to minimize disruption to the business and to safeguard against damage to brand image. With IBM PEM, enterprises can centralize onboarding activities across applications and get a holistic view of partner relationships to proactively manage and prevent situations, such as out-of-date contact information and expired certificates.

IBM PEM is a software-as-a-service (SaaS) solution for trading partner onboarding and relationship management, providing necessary resources and capabilities, such as self-service capabilities for

business users and REST APIs for integration, for rapid onboarding and connectivity with tradingpartners, and better visibility and control over processes impacting trading partner relationships. IBM PEM is a unified solution to core, recurring issues that have been addressed separately in the past (partner onboarding and relationship management) and offers a standardized, configuration-driven framework for onboarding process automation. Workflow-driven processes reduce manual processing and errors, and self-service capabilities for business users reduce IT involvement while ensuring a streamlined onboarding process that is proactive in terms of the clear identification of tasks, roles, and responsibilities along with the provision for escalation and alerts in case of delays or issues with responses from partners.

IBM PEM provides sponsor organizations with a drag-and-drop interface to specify the information required from trading partners, along with well-defined workflow steps and approval check points. Sponsor organizations can define dialogs for interacting with trading partner community members, be it for validating contact information and answering questions to comply with regulatory mandates, or for onboarding to a new service.

IBM PEM eliminates swivel-chair processes to significantly automate the onboarding process, which results in time and resource cost savings. It offers a customizable (sponsor-branded, for example) portal for collaborative interaction between the sponsor and partner organizations. IBM PEM Portal REST APIs can be used for a range of tasks and functions, including the creation of a new partner user and their contact details, the assignment to a specific attribute, their activity status, and services for creating, reading, and updating partner organization information.

A centralized monitoring dashboard provides visibility into the progress of activities and partners, with provision for granular insights enabling identification of operational issues. With IBM PEM, users can configure automated alerts to highlight areas that need attention and drive timely resolution.

IBM PEM is intended to be the single, standard framework for partner management across IBM Watson supply chain offerings, including IBM Supply Chain Business Network (SCBN), IBM Cloud File Exchange (CFX), IBM File Gateway, IBM Transformation Extender (ITX), and IBM B2B Integrator. IBM supports flexible deployment models, where customers can deploy PEM in an IBM managed hosted environment or, if preferred, hosted behind the customer firewall. In both models, customers are provided with the same capabilities and enjoy the benefits of SaaS. Furthermore, integration with on-premises and cloud applications/solutions is supported in both cases. For example, IBM PEM can be integrated with on-premises IBM File Gateway to develop a hybrid cloud solution for partner onboarding.

IBM customers have realized significant benefits from PEM adoption

According to IBM estimates, enterprises can reduce their resource effort by up to 85% via IBM PEM adoption to onboard trading partners. Moreover, IBM PEM on average reduces trading partner onboarding time by 75%. There are several examples of successful IBM PEM implementations that have delivered significant time and cost benefits to IBM customers. IBM PEM can meet a range of requirements, including:

- a central repository for managing trading partner information
- enabling line-of-business (LOB) to take on more responsibility for partner onboarding and management

- migrating partners from one system to another.

A good example of where IBM PEM has allowed IT staff to work on other strategic projects is at a large financial services company that was looking to involve its LOBs to tackle the scale of onboarding thousands of new customers every month. IT staff had concerns regarding errors that could occur from this transfer in responsibility to LOBs. The company had a complex B2B ecosystem, with thousands of routing channels used to address different customer scenarios and target systems. With IBM PEM, the company's LOBs are now able to undertake the complete customer onboarding and relation management processes, with the provision for validation eliminating manual errors. As a result, IT resources have been freed up to focus on more strategic initiatives.

A major bank had thousands of customers that needed to be migrated from a legacy platform onto IBM File Gateway. As part of this migration, the bank was focused on having accurate and current customer information, and was introducing a new mailbox structure to customers. One of the constraints was the unavailability of the 25 full-time employees (FTEs) required to complete the migration to IBM File Gateway. The bank used IBM PEM and IBM community development services to engage with customers and manage the migration work. With this combination, the bank completed the migration to IBM File Gateway on time, with an 85% reduction in resources that were otherwise required for migration. Because customer data is now maintained in a central repository that can be updated on a frequent basis, customer contact and transmission information is always current for the purpose for relationship management. The bank is using IBM PEM for onboarding new customers and managing customer relationships.

Most IBM PEM customers have expressed the need to ensure that their trading partner data (simple contact information, security certificates, and server details) remains current once these partners have been onboarded. IBM PEM helps ensure that partner information is current, with a centralized repository maintaining all essential partner information, which in the past could have been distributed over several sources. With IBM PEM, customers have access to a secure, auditable system to keep their partner data secure and current. IBM PEM reviews the expiration dates for trading partner certificates and sends out automated notifications to partners regarding the certificate updates required.

IBM continues to build on PEM as the central onboarding framework for its solutions, and PEM can also be integrated with customers' own REST API-capable solutions. IBM is focusing on expanding REST API libraries, as well as providing a flexible framework for user authentication and greater visibility via reporting and cognitive capabilities.

Appendix

Further reading

2018 Trends to Watch: Integration, IT0022-001091 (October 2017)

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