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Streamlining Trading Partner Onboarding Through EDI Modernization

EDI ONBOARDING MODERNIZATION

| New trading partners waited weeks to go live

01 Engagement Overview

A regional retail distributor relied on custom point-to-point EDI mapping for every new trading partner, turning each onboarding into a multi-week manual project.

- Scope: Trading partner onboarding workflow, EDI mapping specifications, and partner testing and certification process
- Approach: Assessment of the onboarding backlog and existing mapping architecture before recommending a modernization path
- Baseline: Average onboarding cycle stretching several weeks per new trading partner, with a growing backlog of pending partners

02 Technical Discovery

Reviewing the onboarding pipeline revealed why each new trading partner required custom engineering effort instead of a repeatable process.

- Mechanism: Every trading partner mapping was built and tested individually, with no reusable template library across similar partner types
- Scope: Partner-specific variations in document standards and communication protocols were handled ad hoc rather than through a standardized intake process
- Why it mattered: Without standardized mapping templates, onboarding time scaled linearly with partner count instead of shrinking as partner volume grew

03 Risk & Business Impact

The onboarding bottleneck was not a technical failure, but a growing drag on revenue timing and partner relationships.

- Delayed onboarding pushed back go-live dates for new retail partnerships, directly delaying order flow and revenue recognition
- Standards exposure: Slow onboarding created friction with partners who expected EDI compliance within standard retail chargeback windows
- The backlog consumed engineering capacity that could otherwise support existing partner needs and platform improvements

04 Remediation & Outcome

Modernization introduced standardized mapping templates and a repeatable onboarding workflow that removed the need to re-engineer each new partner connection from scratch.

- Built a library of reusable mapping templates for common trading partner document standards and formats
- Established a standardized partner intake and testing checklist to replace ad hoc onboarding steps
- Automated partner certification testing to validate compliance before go-live
- Reduced average onboarding time significantly by eliminating repeated custom mapping work per partner