



# Elevate

Powered by EDI Support LLC

# Smart EDI Buying Checklist for SMBs

Before you sign any EDI contract, use this checklist to avoid overpaying, long-term lock-ins, and pricing surprises.

## 1. Know Your Real EDI Volume

- Document your current monthly document volume (POs, ASNs, invoices, labels, etc.).
- Estimate projected volume for the next 12–24 months.
- Ask vendors how pricing changes if volume doubles or triples.

*Note: If a vendor can't clearly explain future pricing, that's a red flag.*

## 2. List All Trading Partners Upfront

- Create a list of all current and planned trading partners (retailers, customers, 3PLs).
- Ask how each partner is priced:
  - Setup fees
  - Monthly fees
  - Testing or certification costs

*Note: Adding a partner should not silently increase your contract or pricing tier.*

### 3. Validate Pricing With Similar SMBs

- Ask for references from companies similar to your size and volume.
- Confirm:
  - Monthly spend
  - Hidden fees after go-live
  - Support responsiveness

*Note: If a vendor won't share SMB references, proceed cautiously.*

### 4. Review Contracts Line-by-Line

- Check for:
  - Auto-renewal clauses
  - Early termination penalties
  - Volume overages
  - Tier escalation triggers
- Ask what actions trigger contract renewal (new partner, analytics, upgrades).

*Note: Never rely on verbal pricing promises.*

### 5. Compare at Least 2-3 EDI Providers

- Compare vendors across:

- Total annual cost (not just monthly fees)
- What's included vs charged extra
- Contract flexibility
- Support model

*Note: The cheapest-looking option is rarely the most cost-effective long term.*

## 6. Ask "What Happens When Things Change?"

EDI always changes — this is where costs creep in.

- Add questions like:
  - What happens when a trading partner updates specs?
  - Are mapping changes included?
  - Are re-tests billed?
  - Are compliance changes treated as "new work"?

*Note: If change = invoice, your costs will grow every year.*

## 7. Support Reality Check

Pricing means nothing if support fails.

- Include:
  - What is the **actual response time** for production issues?
  - Is support ticket-based, chat, or direct human access?
  - Is support outsourced or offshore?
  - Is urgent support extra?

*Note: Many SMBs pay enterprise prices for queue-based support.*

## 8. Exit Strategy & Data Ownership

This is one of the most overlooked areas.

- Ask: Can we export our:
  - Maps
  - Trading partner configs
  - Data history?
  - Are there exit fees?
  - Is there a transition assistance policy?

*Note: If you can't leave easily, pricing power shifts to the vendor.*

## 9. Growth Scenario Pricing Test

This is where vendors often avoid specifics.

- Ask: What will pricing look like if:
  - Volume doubles?
  - We add 5 new partners?
  - We expand to a new retailer?

*Note: If they can't model growth pricing, expect surprises.*

**Final Tip: If pricing feels confusing or rushed, pause.** Clear pricing, clear contracts, and clear answers are signs of a provider worth working with.