



# Elevate

Powered by EDI Support LLC

# The SMB EDI Support & Escalation Checklist

Use this checklist when evaluating any managed EDI provider including your current one. You can print, share with your team, or bring to a provider call.

## 1. Support quality (Score each: Yes / No / Unclear)

- Provider publishes response time SLAs by issue priority
- Provider publishes resolution time targets
- You have a named senior EDI contact on the account
- You can reach the senior EDI contact by phone, not just by ticket reply
- First response on urgent issues consistently arrives within 2 business hours
- Most issues are resolved within 48 hours
- Tickets are not routed through tiered L1/L2/L3 queues
- You receive monthly SLA performance reports
- SLA misses trigger service credits or contractual remedy

## **2. Escalation**

- There is a documented escalation path for issues that aren't resolved within SLA
- You can escalate to senior leadership when standards aren't met
- Escalation requests are confirmed in writing
- You are not penalized for escalating
- There are separate escalation paths for platform vs. trading-partner issues

## **3. Onboarding ownership**

- Provider owns document mapping for each trading partner
- Provider runs all partner certification testing
- Provider handles ERP integration end-to-end
- Phased onboarding is offered (critical partners first, then waves)
- Provider hands over readable documentation at go-live

## **4. Monitoring**

- Provider proactively monitors 997 acknowledgments
- Provider catches failed transactions before your trading partners do
- You have access to a real-time dashboard, not just email alerts
- Provider monitors retailer specification changes

## **5. Communication**

- Status updates are written in plain English (no acronym soup)
- You have a single named point of contact, not a queue
- Scheduled check-ins are part of your account
- Documentation is readable by operations teams

## 6. Operational accountability

- Compliance updates (retailer spec changes) are included in subscription
- Trading partner onboarding is included or has transparent per-partner pricing
- There are no separate invoices for "out of scope" routine work
- Monthly reporting includes outcomes, not just activity
- Offboarding terms are clear and reasonable

**Scoring:** If you score "Yes" on fewer than 20 of the 30 items, your current EDI support is materially below the modern managed EDI standard.

If you score below 15, the gap is structural and switching providers is likely the right move.