



EDI Provider Comparison Checklist

Are you getting the service, support and scalability your business needs?

Many businesses stay with the same EDI provider for years.

Not because they're happy.

Because switching feels difficult.

This checklist will help you assess whether your current EDI provider is supporting your business—or holding it back.

Support & service

Can you answer YES to the following?

- ☐ We receive fast responses when issues arise
- ☐ We have direct access to EDI experts
- ☐ Support tickets are resolved quickly
- ☐ We don't rely on multiple follow-ups to get answers
- ☐ We feel valued as a customer
- ☐ We trust our provider to proactively identify issues

Score

5-6 = Excellent

3-4 = Could be improved

0-2 = Support may be impacting operations

Onboarding & implementation

- ☐ New trading partners can be onboarded quickly
- ☐ Changes and updates are handled efficiently
- ☐ Testing and validation processes are straightforward
- ☐ We don't experience unnecessary delays
- ☐ Our provider takes ownership of implementation projects

Ask yourself

How much revenue or productivity is lost while waiting for changes to be completed?

Integration & visibility

- ☐ Our EDI integrates seamlessly with our ERP
- ☐ Data flows automatically between systems
- ☐ We have visibility across transactions
- ☐ We don't rely on spreadsheets to monitor activity
- ☐ We can quickly identify and resolve issues
- ☐ Warning sign

If teams are manually checking data between systems, your EDI may not be delivering full value.

Scalability

- ☐ Our EDI solution supports business growth
- ☐ New customers can be connected easily
- ☐ New suppliers can be onboarded without disruption
- ☐ Transaction volumes can increase without operational strain
- ☐ Our provider has a clear roadmap for future growth

Ask yourself

Can your current setup comfortably handle twice your current transaction volume?

Commercial value

- ☐ Pricing is transparent
- ☐ We understand exactly what we're paying for
- ☐ Changes don't result in unexpected charges
- ☐ We believe our EDI provider delivers value beyond compliance
- ☐ Our provider actively helps us improve efficiency

Warning sign

If your EDI relationship feels purely transactional, you may be missing opportunities to improve operational performance.

Managed services

- ☐ Our provider monitors transactions proactively
- ☐ We receive support before issues become problems
- ☐ We don't need internal EDI specialists
- ☐ Our team spends minimal time managing EDI processes
- ☐ We have confidence in business continuity

Ask yourself

Is your team managing EDI—or is your EDI provider managing it for you?

Your results

Total Number of YES Answers

25–30

Excellent

Your provider is likely supporting growth and operational efficiency.

18–24

Good

There may be opportunities to improve support, visibility or scalability.

10–17

Needs Review

Your EDI environment may be creating operational friction.

Below 10

High Risk

Your provider may be limiting efficiency, visibility and future growth.

Final question

If you were selecting an EDI provider today...

Would you choose the one you currently have?

If the answer isn't an immediate "yes", it may be time to reassess your options.

About Celtrino

Celtrino helps businesses simplify trading operations through fully managed EDI services, seamless integrations and expert support.

Our focus is simple:

Reduce friction.

Improve visibility.

Help businesses trade more efficiently.

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