IBM

A New Era in On-boarding – It’s all about managing relationships

A technical overview of IBM Partner Engagement Manager

Watson Supply Chain

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The state of on-boarding today

Many companies have a complex and sometimes global mix of trading partners (suppliers, partners and customers) they do business with and often times have large, cross-functional teams of personnel involved in their onboarding process ranging from IT staff, to Supplier / Customer Relationship Managers, to legal and administrative staff.

This large mix of external partners and internal staff, exchanging administrative and technical connectivity information that's routinely changing is a challenging, burdensome and inherently slow process, with little or no enterprise visibility into the state of each partner's onboarding journey. So on-boarding each one and the documents that get exchanged and managing the relationships on an on-going basis can be challenging, especially when relying on a largely manual process.

If you look at it from an IT perspective they bear the responsibility to drive the initial on-boarding process. This could be across multiple applications and processes, having to support a diverse set of communication protocol requirements plus the establishment of passwords, certificates, keys, and contact information, all of which take time and then soon become out-of-date or expire. They also have to ensure that the data they capture and maintain about the business relationship is secure.

From the business's perspective they have to wait on the on-boarding process to start driving revenue from the relationship. They experience both failures to critical processes when security certificates expire and subsequent delays in resolving the issue due to out-of-date contact information. Worse-case they experience a security breach which exposes all kinds of data including sensitive on-boarding data which damages their reputation and is costly to remediate.

The end result is an impact to a company's business and a negative reflection on the relationships they have with their B2B community plus redundancy and costs in the work involved.

IBM's point-of-view

From IBM's point-of-view establishing a business relationship with a partner includes three considerations. 1) The on-boarding activities necessary to set-up a new partner or new document with an existing partner, 2) a "continuous touch" approach to managing the relationship and 3) offering line-of-business and partner staff the self-service necessary to end reliance on I.T. Collectively they offer companies a fresh, proactive approach to managing the complete relationship with a partner, as it's more than just on-boarding.

But most companies don't think of it in that respect. They tend to focus on the on-boarding process itself rather than proactively managing the relationship on an on-going basis. Then, when the on-boarding process is complete, they turn to other priorities and only react when a process fails or some other aspect of the relationship needs attention.

IBM Partner Engagement Manager

To address this need IBM offers IBM Partner Engagement Manager (PEM). PEM is a SaaS based, centralized on-boarding offering that allows companies to implement and maintain a more innovative and industry-leading approach to managing B2B collaboration relationships while acting as a system of engagement for both partners and sponsors. This helps eliminate the redundancy of having to on-board a trading partner across multiple applications and processes and helps reduce the costs of both the initial on-boarding and the on-going management of the relationship while improving the time-to value from the relationship.

However, when most companies think about on-boarding, they tend to focus on the traditional "silo'd" supplier and customer driven use cases. But IBM's customers are applying PEM to a far broader set of use cases. Due to PEM's extensive workflow, role-based control and user delegation capability, companies are also broadening PEM's use to include both upstream partner onboarding tasks (think contractual and legal processes) as well as downstream departmental document exchanges (think promotions and / or targeted initiatives). In addition to full partner self-service onboarding, PEM enables LOB staff to provide onboarding detail on behalf of partners. PEM then uses REST APIs to load this into IBM B2B Integrator, IBM File Gateway and/or other REST-capable backend applications.

PEM features

Sponsor Line-of-Business User Support

- Sponsor admin can create and maintain LOB users
- Sponsor admin can assign/un-assign partners to LOB users.
- LOB users can rollout an activity to partners they own and maintain visibility on their key constituent's progress.

Automatic Certificate Updates

- PEM includes a scheduler-based process to check for partner SSL certificates that are about to expire.
- Configurable options include the number of days until expiration.
- Once PEM identifies partner certificates that are about to expire, PEM initiates an email campaign to those affected partners, with prompts to upload new certificates. Once uploaded by the partner, PEM leverages REST APIs to push the new certificates into IBM Sterling File Gateway, as an example.

Partner Self Service Maintenance activity

- PEM sponsor administrators can define and share self-service activities with the partner.
- Partners can update the configuration they own like the partner FTP host, port, credentials etc.
- The sponsor can control which self-service data partners can update as part of activity definition.
- Sponsor administrators can initiate PEM campaigns with defined start and end dates
- Chosen PEM activities can be "shared" with partners in an ongoing basis, allowing partners to interactively execute PEM activities on an "as needed" basis."

Custom roles

- PEM sponsor administrators can create custom PEM roles (e.g., "MFT Onboarding", "EDI Onboarding", "Contract Review", "Supplier Management", etc.)
- Roles can be designated to various PEM activities or stages of activities enabling members of cross-functional teams to participate in different phases of a partner's entire onboarding experience

PEM architecture

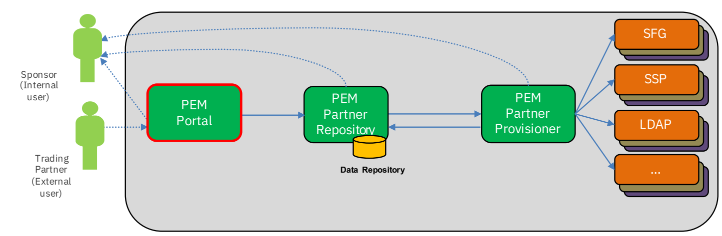
As a SaaS based application, PEM was designed to support hybrid deployment models and can bridge across both on-premises and Cloud based applications. It's modular architecture leverages REST APIs to enable extensibility with other applications while the inclusion of "Docker" images offers a degree of portability by allowing a given instance of PEM to reside in a Docker container.

At the same time, IBM recognizes that companies need to protect the partner data they collect and manage so PEM offers a "Local" Cloud option to store the data behind a local firewall.

Key components of this architecture include an activity framework, an organizational framework and a REST API infrastructure that allows a PEM sponsor to send and receive partner information into sponsor REST API capable backend systems including IBM Sterling B2B Integrator / IBM Sterling File Gateway as well as other REST-capable backend applications

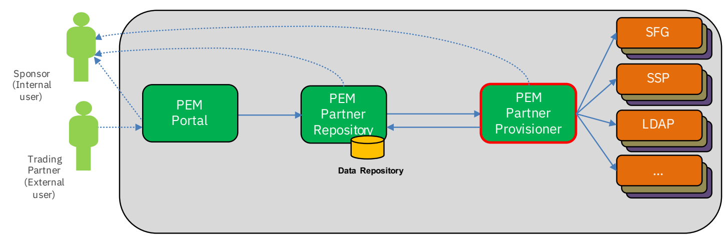
PEM Portal – Self-service, SaaS, extensible through configuration/templates, includes a data repository with the module

- Partners can self-onboard and self-administer related contact and communications profile information without IT involvement
- Supports both out-of-box flows and the ability to custom define flows for onboarding & maintenance
- Offers centralized monitoring of activity progress across a global B2B community
- Sponsors can manage partner relationships by adding them to groups (a collection of individual attributes) or individual attributes themselves and easily select partners to participate in various campaigns by those attributes (e.g., “Eastern Zone”, “Tier1”, “Tier 2”, “Corporate Health Care Providers”, “Retail”, “Electronics”, etc.).”



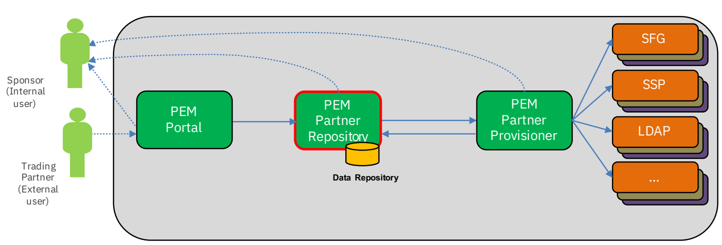
PEM Partner Provisioner – Understands specific backend applications, pushes configurations, and is modular

- Provides out-of-box workflows for IBM File Gateway integration and the ability to define custom workflow integrations.
- Dynamically add support for new back-end deployments
- User interface to build workflow driven activities to allow for deployment with back-end systems
- Receives triggering events via JMS from the Partner Repository
- Ability to define & configure new backend system to onboard a partner and their configuration using REST APIs.



PEM Partner Repository – Application agnostic, stores structured canonical data and provides REST APIs an administration UI, and is modular

- System of record for all partner data collected through PEM.
- Dynamically add support for new data structures
- Provides an audit trail of all changes made to resources.
- Stores both test and production configuration.
- Provide and track the lifecycle of relationships.
- Includes a data model, REST APIs and basic UI.



Software and hardware requirements

For insight on the technical requirements to deploy PEM, reference documentation on this site. https://www.ibm.com/support/knowledgecenter/en/SSKPRS/com.ibm.help.pem.sysrequirements.doc/c_sw_hw_reqs.html

Deploying PEM

For insight on the steps involved with deploying PEM, including the use of “Docker” images, REST APIs or integration to IBM File Gateway, reference documentation on this site.

https://www.ibm.com/support/knowledgecenter/en/SSKPRS/com.ibm.help.pem.deploying.doc/c_deploying.html

How IBM Services can help

IBM Services offers options to help customers jump start the deployment of PEM to quickly leverage its value. They can:

- Take the lead for the initial deployment of a selected use case
- Provide a best-practices approach to on-boarding and the management of relationships
- Conduct a knowledge transfer to enable IT staff
- Offer time and material or fixed fee services engagement
- Let you choose from a variety of Services, suitable for your needs
- Offer the business a positive, accelerated experience with the deployment of a new application

Benefits you can expect

IBM Partner Engagement Manager is designed to help companies centralize the on-boarding and management of their B2B relationships. By deploying PEM companies can experience:

- Lower on-boarding costs and dramatically shorten and speed up the entire onboarding timeline to increase time to revenue
- A shift in responsibility to the B2B partner and/or Line of Business staff for the integrity of partner contact and certificate data, alleviating the need for IT staff involvement in every partner interaction
- Enabling line-of business staff a greater degree of control over managing the on-going relationship

Subsequently, service levels and customer satisfaction should also improve as fewer process disruptions occur which can free up I.T. resources to focus on other priorities.