

## Overview

This Benchmark Checklist is a comprehensive set of dimensions for evaluating your current digital billing and payment experience, specifically for your business customers. This list is a direct reflection of the self-service capabilities available in the global market today, including features that are commonly included as requirements in Enterprise RFPs. This includes:

- User Access
- Dashboards
- Bills
- Reporting
- Hierarchies and Cost Allocation
- Payments
- Disputes
- Notifications
- User Management
- User Preferences
- Data Integration
- Technology
- Security
- Reliability
- Branding

## What value is your current experience delivering to you and your customers?

While evaluating your digital billing experience, it is important to measure the impact your current approach is having on the following metrics:

- Digital adoption rates (per segment, per product line)
- Customer satisfaction (Net Promoter Score, Likelihood to Recommend)
- Customer support costs
- Billing production costs
- Online payment volumes
- Days Sales Outstanding (DSO)
- Customer retention
- Customer acquisition

## Benchmarks

Globys has a deep understanding of the digital billing and payment capabilities at play today, both regionally and globally. In addition, we also have a unique perspective into the tangible value associated with specific features, functionality, and delivery approaches.

All benchmark information will be made available during a benchmark review, where we will assess the below checklist and above metrics to determine how your current experience compares to the broader market.

Globys recommends the following rating scale:

- 0 = feature not offered
- 1 = feature partially offered
- 2 = feature offered
- 3 = advanced feature offered

Evaluation Dimension	Description	Score	Notes
<b>USER EXPERIENCE</b>			
<b>Access</b>			
SSO through existing portal	Allow for direct access through customer portal, inheriting existing user permissions		
Configurable per customer segment	Allow for tailored experience with features aligned to segment specific needs		
<b>Dashboard</b>			
Message center	Provide a configurable channel to communicate system notifications and customer communications		
Customer summary	Provide user with overview of recent transactions		
Account changes	Provide user with notifications of recent changes		
End user configurable dashboard	Allow user to define trended dashboard layout		
<b>Bills</b>			
13+ months of bills	Allow user to view current or previous bills		
Consolidated bill viewing	Allow user to combine bills from varying products and systems into a single view		
User-defined budgets	Allow user to define and view budget variances per account		
Month-over-month comparison	Allow user to run 12 month trended fee analysis		
Bill to detail drilldown	Allow user to click directly from bill line item to associated detail data		
Searchable bills	Allow user to find bills and fees according to user-defined criteria		
User configurable account descriptions	Allow user to add user-defined descriptions to accounts		
User configurable account grouping	Allow user to group accounts and bills by source, bill date, descriptions		
Additional documentation storage	Host additional customer documents which can be viewed and downloaded on demand		
Paperless billing preference	Allow user to set any or all accounts to paperless		
Export options	Allow user to download bills in variety of formats		
<b>Reporting</b>			
3+ months of usage and fee data	Provide access to current and historical data		
Usage reporting	Allow user to monitor near real-time usage activity		
Default summary reports	Allow user to view a set of standard reports		

Default detail reports	Allow user to view a set of standard detail reports		
Editable default reports	Allow user to edit and save the parameters of default reports		
User configurable summary reports	Allow user to create an unlimited number of summary reports		
User configurable detail reports	Allow user to create an unlimited number of detail reports		
Drill down from summary to detail	Allow user to click directly from line item in summary report to associated detail data		
Tabular reporting	Allow user to view and create tabular reports		
Graphical reporting	Allow user to view and create graph reports		
Trended reporting	Allow user to run multi-month reports		
In-app report sharing	Allow user to share created reports with other users		
Automated report creation	Allow user to setup a recurring schedule for report creation		
Automated report delivery	Allow user to setup a recurring schedule for report delivery		
Scheduled reporting for colleagues	Allow user to setup a recurring schedule for report delivery to a user-defined distribution list		
Default filters	Allow user to apply a set of standard filters to default of user-created reports		
User configurable filters	Allow user to create filters leveraging all available data fields		
Export options	Allow user to download all reports in a variety of formats		
<b>Hierarchies &amp; Cost Allocation</b>			
User configurable hierarchy	Allow user to build a hierarchy within the application		
User assignment of accounts to hierarchy	Allow user to add accounts to hierarchy		
Splitting of charges across hierarchy	Allow user to specify the percentage of charges to be applied to specified accounts		
Multiple hierarchies	Allow user to build and apply two or more hierarchies		
Private/public chart of accounts	Allow user to select sharing/no sharing with other users		
Cost allocation reporting	Allow user to run a cost allocation report across selected hierarchy		
Export options	Allow user to export reports and hierarchies in a variety of formats		
<b>Payments</b>			
Single or multi-payments	Allow user to make payment for a single or consolidated bill		
Multiple payment methods	Allow user to select credit card or bank payment		

Digital wallet	Allow user to store payment sources for future payments		
Auto-payments	Allow user to set-up recurring payments across any or all accounts		
Payment transaction confirmation	Provide user with detailed transaction receipt		
Payment history	Provide user with detailed view of previous payments		
Offline remittance slip	Allow user to print remittance slip for single or consolidated bill		
Integration with payment gateways	API to existing payment gateways		
Integration with supplier's Accounts Receivable	Automated transfer of captured remittance data		
<b>Disputes</b>			
Online dispute initiation	Allow user to initiate dispute from online bill		
Line item or invoice level dispute	Allow user to select specific charge or total invoice		
Dynamic removal of dispute amount	Automatically remove dispute amount from total due to allow customer to proceed with payment		
Dispute status alerts	Provide in-app and email status updates to user		
Integration with dispute workflow	Automatically create dispute case following user initiation		
<b>Notifications</b>			
Delivery options (Email, SFTP)	Allow user to define how reports are received		
One-time bill delivery	Allow user to schedule delivery via preferred channel		
Recurring bill delivery	Allow user to schedule daily/weekly/monthly delivery via preferred channel		
One-time report delivery	Allow user to schedule delivery via preferred channel		
Recurring report delivery	Allow user to schedule daily/weekly/monthly delivery via preferred channel		
One-time allocation report delivery	Allow user to schedule delivery via preferred channel		
Recurring allocation report delivery	Allow user to schedule daily/weekly/monthly delivery via preferred channel		
User configurable alerts	Allow user to define multi-parameter fee and transaction alerts		
Automated email alert monitoring and delivery	Provide continual alert tracking and delivery based on user specifications		
<b>User Management</b>			
Multi-user environment	Allow multiple users from organization to access application		
Per-account access controls	Allow admin to define account visibility per user		

Admin user permissions control	Allow admin user to define permissions per user		
User configuration system notifications	Allow user to select preferences for system notifications		
<b>User Preferences</b>			
Language preference	Allow user to select from applicable languages		
Request for linking additional accounts	Allow user to submit request for combining additional existing accounts into organizational view		
<b>DATA INTEGRATION</b>			
13 months historical bills and data from billing system(s)	Consolidate transaction and fee data from billing system(s)		
ETL process	Support extraction, transformation, and loading of data from multiple systems and run schedules		
<b>TECHNOLOGY</b>			
Open architecture & APIs	Support the ingestion of multiple data sources		
Cloud-based storage	Support thousands of users across multiple years of data		
System alerts	Integrated process and performance monitoring and alerting		
<b>SECURITY</b>			
Authentication and Access	Governed by supplier's overall security policy		
Secure communication and data delivery	Data is presented and secured for customers using encryption and secure transport technologies (SFTP)		
<b>RELIABILITY</b>			
Up-time	Specified SLAs for uptime along with documented statistics for last 24 months		
Disaster recovery	Provide documented Disaster Recovery Plan		
Redundancy	Configured for data centers and networks		
Storage	Off-site storage of backups		
<b>BRANDING</b>			
Configurable to supplier look and feel	Apply corporate design elements to application		
Configurable to supplier messaging/terminology	Align application terminology to supplier terminology		