



Switching 3PLs:

4 Steps to Success

Switching 3PLs is no small task. You need to assess capabilities. Wade through bids. Conduct due diligence. And finally weigh out the alternatives and make your choice.

A demanding process? For sure. But it doesn't stop there. The next task is to nail the transition to your new 3PL. This checklist can help make that process easier and less stressful — and help ensure your business stays at full throttle during the changeover.

Set Clear Expectations

This is a critical first step. Focus on equipment and technology requirements. Document how you'll communicate about orders. Go over the special services you routinely require for your most-common shipments so the 3PL can establish presets in its shipping platform. And don't forget to make sure their customer service hours align with your hours of operation.



Get on the same page about billing

Yes, it's basic stuff. But your accounting department will thank you for addressing it. Here are the key points to cover:

- » Ask when and how often you'll receive invoices.
- » Let them know if you prefer electronic invoices or hard copies.
- » See if they can customize their invoice format to synch with your accounting department's needs.



Establish a transition timeline

Work together on a written timeline that factors in everything from getting login access to training on their systems. And don't forget to get specifics on how to migrate your information, including important things like your address book and commodities list, to the new 3PL's transportation management system (TMS).



Review terms and conditions

Discuss credit and payment terms, and fill out the paperwork to ensure your first shipment gets processed on time. And don't forget to ask about additional charges such as credit card upcharges and late fees.



A Partner You Can Trust

Your shipments deserve first-class handling and care — and a 3PL partner that'll provide the same level of attention to the transition and onboarding process.

Ready to get started? Discover how Worldwide Express can make transitioning your business shipping a seamless experience. Contact Worldwide Express today!

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