

# Operational Maturity Framework Worksheet

A 5-minute self-assessment to benchmark where your order operation sits and where to focus first.

## THE THREE LEVELS OF SUPPLIER OPERATIONAL MATURITY

Most suppliers are here

<p><b>LEVEL 1</b> <b>Reactive</b></p> <p>Orders managed manually, channel by channel. No centralized intake. EDI may exist but still involves manual touch. Ops team is always putting out fires.</p> <p><b>Regular chargebacks</b> <b>Slow acknowledgment</b> <b>Hard to add partners</b></p> <p><b>Always at capacity</b></p>	<p><b>LEVEL 2</b> <b>Partially Automated</b></p> <p>Some channels automated — maybe EDI with a few retailers, maybe a rep tool. But systems don't talk to each other. Every new partner still creates disproportionate work.</p> <p><b>Channel inconsistency</b> <b>Manual handoffs</b></p> <p><b>Patchwork of tools</b> <b>Fragile to change</b></p>	<p><b>LEVEL 3</b> <b>Integrated</b></p> <p>All order channels flow into one connected system. ERP receives clean, validated data. EDI compliance is automated. Ops team handles more volume without more headcount.</p> <p><b>Low chargeback rate</b> <b>Fast partner onboarding</b> <b>Ops focused on growth</b></p>
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## WHY THIS MATTERS

Most supplier-retailer relationships break down because the operation behind it can't keep up. Wrong quantities, late ASNs, and pricing discrepancies trigger chargebacks, erode buyer trust, and quietly move your vendor scorecard in the wrong direction.

The suppliers who consistently win and retain retail accounts have built systems, not workarounds. They've removed the human from the loop for routine order processing, and they've standardized how data moves between their operation and their partners. This worksheet helps you see exactly where you stand and what to fix first.

## WHAT MOVING TO LEVEL 3 LOOKS LIKE IN PRACTICE

<p><b>50%</b> <b>chargeback rate reduction</b> <i>avg. after centralizing order intake</i></p>	<p><b>900+</b> <b>labor hours saved per year</b> <i>freed from manual order entry</i></p>	<p><b>3 wks</b> <b>to onboard a new retail partner</b> <i>down from 3+ months</i></p>
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## WHO THIS IS FOR

<p><b>Manufacturers &amp; Brands</b></p> <p>Selling into retail chains, grocery, hardware, or specialty — managing EDI compliance, chargebacks, and multi-channel order intake.</p>	<p><b>Wholesale Distributors</b></p> <p>Managing orders from hundreds of retail accounts, coordinating with multiple vendors, and keeping fulfillment data clean across your ERP.</p>	<p><b>Ops &amp; Supply Chain Leaders</b></p> <p>VPs, directors, and managers responsible for order accuracy, trading partner compliance, and building the infrastructure to scale without adding headcount.</p>
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## HOW TO USE THIS WORKSHEET

For each question on the following page, **check the one answer that most closely matches your operation today** — not where you want to be. At the end, count your checks by level. The level with the most checks is where you sit.

## DIAGNOSTIC QUESTIONS

<b>1</b>	<b>Where do orders come in?</b>
L1	<i>Think about all the channels your team currently handles.</i>
<input type="checkbox"/>	Multiple channels (portals, email, phone, reps ), each handled separately by the team
<input type="checkbox"/>	Some channels have a process; others still come in ad hoc with no consistent handling
<input type="checkbox"/>	All channels (EDI, portals, and more) flow into one centralized system automatically
<b>2</b>	<b>How are retail portal orders processed?</b>
	<i>e.g. Walmart Retail Link, Sobseys portal, retailer-specific platforms</i>
<input type="checkbox"/>	Someone downloads the order and re-enters it manually into our ERP
<input type="checkbox"/>	We have a semi-automated process for some portals; others are still manual
<input type="checkbox"/>	Portal orders flow directly into our system — no manual re-entry required
<b>3</b>	<b>How are EDI purchase orders (850s) handled?</b>
	<i>From receipt through to ERP entry.</i>
<input type="checkbox"/>	Manually reviewed, translated, and entered by a team member
<input type="checkbox"/>	Partially automated — EDI is in place but still involves manual review or touch
<input type="checkbox"/>	Fully automated — 850s are received, validated, and pushed to ERP without manual handling
<b>4</b>	<b>How do sales rep orders get into your system?</b>
	<i>Think about the path from rep to ERP.</i>
<input type="checkbox"/>	Reps text, email, or call in orders — someone enters them manually
<input type="checkbox"/>	Reps use a tool for some orders, but workarounds still happen regularly
<input type="checkbox"/>	Reps submit through a connected app with live inventory and pricing — orders flow straight to ERP
<b>5</b>	<b>What is your average EDI acknowledgment time (855)?</b>
	<i>Time from receiving a purchase order to sending the acknowledgment.</i>
<input type="checkbox"/>	More than 48 hours, or we often miss acknowledgment windows entirely
<input type="checkbox"/>	Usually within 48 hours, but inconsistent — depends on workload and who's available
<input type="checkbox"/>	Under 24 hours, consistently — acknowledgments are automated and go out on schedule

<b>6</b>	<b>How are advance ship notices (856s) generated?</b> <i>Think about what triggers the ASN and who does the work.</i>
L1 <input type="checkbox"/>	Created manually by someone on the team when an order ships
L2 <input type="checkbox"/>	Semi-automated for some trading partners; manual for others
L3 <input type="checkbox"/>	Generated automatically at shipment — no manual step involved
<b>7</b>	<b>How does order data get into your ERP?</b> <i>Across all order types and channels.</i>
L1 <input type="checkbox"/>	Manual entry — someone keys orders in regardless of how they arrived
L2 <input type="checkbox"/>	Mix of direct integration and manual entry depending on the channel
L3 <input type="checkbox"/>	Direct integration — all orders flow into ERP clean and validated, no re-entry
<b>8</b>	<b>Can your trading partners check order status without contacting you?</b> <i>Retailers, distributors, buyers — any external partner.</i>
L1 <input type="checkbox"/>	No — they have to call or email us to get updates
L2 <input type="checkbox"/>	Some partners have visibility; others still rely on us to provide updates manually
L3 <input type="checkbox"/>	Yes — partners can check order status and confirmations without contacting us
<b>9</b>	<b>How long does it take to onboard a new retail partner operationally?</b> <i>From signed agreement to first clean order flowing through your system.</i>
L1 <input type="checkbox"/>	Months — it's a significant lift for the ops team every single time
L2 <input type="checkbox"/>	A few weeks, but still more work than it should be
L3 <input type="checkbox"/>	Two weeks or less — we have a repeatable process and the system handles most of the setup
<b>10</b>	<b>How many charge backs did you receive in the last 90 days?</b> <i>Approximate is fine.</i>
L1 <input type="checkbox"/>	More than we'd like — a recurring issue we manage reactively
L2 <input type="checkbox"/>	A few — we've addressed some root causes but errors still happen
L3 <input type="checkbox"/>	Rarely or never — our compliance rate is high and errors are caught before they ship

## SCORING YOUR RESULTS

Count your checks in each level. The level with the most checks is where your operation sits today.

Your level	What it means	
<b>Level 1 Reactive</b>	Manual ops are creating friction and chargeback risk today. The highest-impact first step is centralizing order intake — one place where all channels flow in.	__ /10
<b>Level 2 Partially Automated</b>	You've made progress, but fragmentation is your biggest risk. Focus on closing the manual handoffs still sitting between your channels and ERP.	__ /10
<b>Level 3 Integrated</b>	Your operation is a competitive asset. Retailers feel the difference. Maintain compliance standards and keep tightening new partner onboarding speed.	__ /10

## QUICK WINS BY LEVEL

	Where to focus
<b>Level 1 → 2</b>	Pick one channel and fully automate it. Start with EDI — automated 855s and 856s deliver the fastest visible improvement on vendor scorecards.
<b>Level 2 → 3</b>	Centralize order intake across all channels into a single system. Goal: your ERP receives clean, validated data regardless of how the order arrived.
<b>Sustain Level 3</b>	Measure what your retail partners measure — fill rate, EDI compliance rate, chargeback rate, acknowledgment speed. Set internal benchmarks and review quarterly.

## HOW YOUR SCORE SHOWS UP WITH RETAIL PARTNERS

### Level 1 — At risk

Buyers are logging your chargebacks and slow acknowledgment times. You may not know your vendor scorecard is suffering until orders start shrinking or you're cut from a promotion.

### Level 2 — Maintaining

The relationship is stable but not growing. Buyers work with you but aren't advocating for you. You may be passed over for new shelf opportunities without knowing why.

### Level 3 — Preferred

You're the vendor buyers want to grow with. Clean data, fast acknowledgment, no surprises. You get first consideration for new placements, promotions, and store expansions.

## YOUR NEXT STEP

# Now see what it's costing you

You know where your operation sits. The next question is what staying there is worth in real dollars with labor hours, chargeback losses, and the revenue you're not capturing because your backend can't keep up.

[Calculate your cost >](#)