

Do You Need OMS?

25 Questions to Help You Find Out

Do You Need an Order Management System?

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Intro

Most B2B companies don't realize they have an order management problem — because they've normalized the workarounds. The symptoms show up as customer complaints, manual processes, and revenue you can't quite capture. But the root cause is almost always the same: your systems can't keep up with what your customers and your business actually need. These questions are designed to help you diagnose whether your current order management approach is holding you back.

Inventory Visibility

Your ability to promise and deliver starts with knowing what you have, where you have it, and what's coming. If your team can't answer basic inventory questions without making phone calls or checking multiple systems, fulfillment will always be reactive.

1. Can your team see real-time inventory across all warehouse locations from a single view?
2. Do you have visibility into in-transit inventory and open purchase orders — not just what's on the shelf?
3. Are customers ever told something is out of stock when it's actually available at another location?
4. Does your inventory picture update in real time, or are you working from batch updates once or twice a day?
5. Can you control how much inventory is allocated to specific channels (e.g., eCommerce vs. marketplace vs. in-house)?

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Order Routing & Fulfillment

How an order gets fulfilled matters as much as whether it gets fulfilled. If every order follows the same path regardless of customer needs, location, or urgency — or worse, requires someone to manually figure it out — you're leaving efficiency and revenue on the table.

1. When a customer places an order, does your system automatically determine the best fulfillment location — or does someone figure that out manually?
2. Can you route orders based on rules like customer priority, shipping cost, warehouse capacity, or carrier performance?
3. If a warehouse goes down (weather, outage, capacity), can you reroute orders to another location without manual intervention?
4. Can your system handle split shipments across multiple locations when a single warehouse can't fulfill the full order?
5. Do you have drop-ship workflows that are automated, or does every drop-ship order require manual coordination with the supplier?

Delivery Promises & Customer Expectations

Your customers are comparing you to their B2C experiences whether you like it or not. If you can't tell them when something will arrive — or worse, you tell them and miss it — trust erodes fast.

1. Can you provide customers with accurate, real-time delivery date estimates at the time of order?
2. If a customer needs expedited shipping, can your system handle that request and adjust routing and cost automatically?
3. Can customers see delivery options and make their own trade-offs (speed vs. cost, split shipment vs. wait for full order)?
4. When delivery dates change, are customers notified proactively — or do they have to call in to find out?
5. Can you commit to a delivery promise and actually trace every step of fulfillment back to validate that you can meet it?

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Order Changes & Flexibility

In B2B, orders change. Quantities shift, delivery dates move, line items get added or removed. If every change triggers a manual fire drill, your system isn't built for the way business actually works.

1. Can customers or your team modify an order after it's been placed — add items, change quantities, adjust delivery dates — without starting over?
2. Can you put an order on hold and set an automatic release date for future fulfillment?
3. If a customer calls to change a delivery requirement mid-order, can your system accommodate that in real time?
4. Can you reserve inventory against a future order (e.g., a committed holiday or seasonal order) so it's protected from other allocations?

Customer Priority & Allocation

Not every customer is the same, and not every order should be treated equally. When inventory is constrained, your system should know who gets served first — without someone making that call manually.

1. When inventory is limited, does your system allocate based on customer priority — or is it first-come, first-served?
2. Can you define customer tiers or segments that automatically influence how orders are routed, fulfilled, and prioritized?
3. Are your allocation rules configured in a system, or do they live in someone's head or an Excel spreadsheet?

Manual Effort & Scalability

The biggest hidden cost in B2B fulfillment isn't technology — it's labor. If your team is spending more time routing orders and chasing information than they are solving real customer problems, you have a scalability issue.

1. What percentage of your orders require manual intervention to fulfill — not because they're complex, but because the system can't handle the requirements?

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Manual Effort & Scalability (cont'd)

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1. What percentage of your orders require manual intervention to fulfill — not because they're complex, but because the system can't handle the requirements?
2. Is your customer service team spending more time on order status inquiries and firefighting than on proactive customer engagement?
3. Could your current process handle 2x order volume without adding headcount?

What Your Answers Tell You

If you answered "no" to more than a handful of these, you're not alone — most B2B companies are in the same position. ***But every "no" represents either a cost you're absorbing (in labor, errors, or missed SLAs) or revenue you're not capturing (in orders you can't fulfill, channels you can't serve, or customers you can't say "yes" to).***

The good news: solving this doesn't require ripping out your ERP. It requires adding the orchestration layer between your commerce platform and your system of record that your business has likely outgrown.

For More Information...

If you have questions about OMS (or any other part of your digital journey), we'd love to help:

- **Book a FREE consultation:** [Click here.](#)
- **Email:** info@b2b-squared.com
- **Call:** 262.682.0550



About

Lost in digital? We're your GPS.

B2B Squared guides B2B companies through the chaos of digital evolution with the precision of turn-by-turn navigation. We pinpoint where you are (digital maturity assessments), map the smartest route (strategy workshops), find the right technology pit stops (Platform Genius selection tool), optimize your journey (Flywheel B2B marketing automation and SKU Factory for product data), and help navigate the roadblocks (The Digital Roadmap newsletter).

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