



## **SMB Order Processing Workflow Assessment Checklist**

## **Is Your Order Process Ready to Scale?**

As your business grows, every unnecessary manual step adds time, cost, and risk. Use this checklist to evaluate how efficiently orders move through your business and identify opportunities to automate with ERP and EDI.

### **Step 1: Order Entry**

#### **How do customer orders arrive?**

- ☐ EDI
- ☐ Customer portal
- ☐ Email
- ☐ PDF attachment
- ☐ Phone
- ☐ Spreadsheet upload
- ☐ Other

#### **What happens after an order is received?**

- ☐ Automatically creates a Sales Order in our ERP
- ☐ Someone manually enters the order
- ☐ Someone reviews every order before processing
- ☐ Data is copied between multiple systems
- ☐ We print the order for someone else to process

## Step 2: Manual Touchpoints

### **How many people touch a typical customer order?**

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4+

### **Which departments handle the same order?**

- ☐ Customer Service
- ☐ Sales
- ☐ Operations
- ☐ Warehouse
- ☐ Purchasing
- ☐ Accounting
- ☐ Shipping
- ☐ IT

### **Does anyone manually:**

- ☐ Enter customer information
- ☐ Enter item numbers
- ☐ Enter pricing
- ☐ Enter quantities

- ☐ Re-enter shipping information
- ☐ Update inventory
- ☐ Create invoices
- ☐ Generate ASNs
- ☐ Send emails with order updates

### Step 3: System Connectivity

#### **Which systems are involved?**

- ☐ ERP
- ☐ WMS
- ☐ TMS
- ☐ Accounting software
- ☐ EDI platform
- ☐ CRM
- ☐ Excel
- ☐ Google Sheets
- ☐ Customer portals

#### **Are these systems connected automatically?**

- ☐ Yes
- ☐ Partially
- ☐ No

### **Does the same information get entered more than once?**

- ☐ Customer data
- ☐ Orders
- ☐ Shipments
- ☐ Tracking numbers
- ☐ Invoices
- ☐ Inventory

### **Step 4: Order Visibility**

#### **Can your team quickly answer:**

- ☐ Where is this order?
- ☐ Has it shipped?
- ☐ Has the ASN been sent?
- ☐ Was the invoice delivered?
- ☐ Has the retailer acknowledged receipt?
- ☐ Is there an error blocking the order?

### **Step 5: Exceptions & Errors**

#### **When something goes wrong...**

- ☐ We receive alerts immediately
- ☐ We discover problems after a customer contacts us
- ☐ Someone manually checks reports every day

☐ Errors are often found too late

**Common issues we experience**

☐ Incorrect pricing

☐ Missing inventory

☐ Shipping delays

☐ Failed EDI documents

☐ Chargebacks

☐ Manual corrections

☐ Duplicate orders

☐ Customer complaints

**Step 6: Scalability**

**If your order volume doubled tomorrow...**

☐ Our current process would scale

☐ We'd need to hire more employees

☐ We'd rely on overtime

☐ We'd fall behind

☐ We honestly don't know

**Which activities consume the most employee time?**

☐ Manual order entry

☐ Reviewing orders

☐ Correcting errors

- ☐ Updating spreadsheets
- ☐ Inventory checks
- ☐ Creating shipping documents
- ☐ Creating invoices
- ☐ Responding to retailer questions

## Step 7: Automation Opportunities

### **Which processes should be automated first?**

- ☐ Order creation
- ☐ Inventory updates
- ☐ Shipping notifications
- ☐ ASN generation
- ☐ Invoice creation
- ☐ Customer updates
- ☐ Payment reconciliation
- ☐ Reporting

## Step 8: Operational Health Score

Answer **Yes** or **No**.

| Question                                                      | Yes                      | No                       |
|---------------------------------------------------------------|--------------------------|--------------------------|
| Orders automatically flow into your ERP                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Data is entered only once                                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Systems share information automatically                       | <input type="checkbox"/> | <input type="checkbox"/> |
| Order status is visible in real time                          | <input type="checkbox"/> | <input type="checkbox"/> |
| Employees aren't maintaining spreadsheets                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Manual approvals are limited to exceptions                    | <input type="checkbox"/> | <input type="checkbox"/> |
| EDI documents are monitored automatically                     | <input type="checkbox"/> | <input type="checkbox"/> |
| Employees spend more time solving problems than entering data | <input type="checkbox"/> | <input type="checkbox"/> |
| You can onboard new customers without adding staff            | <input type="checkbox"/> | <input type="checkbox"/> |
| Your workflows can handle business growth                     | <input type="checkbox"/> | <input type="checkbox"/> |



## Your Results

### **8–10 Yes**

Your order processing workflow is well positioned for growth. Continue optimizing automation and monitoring to improve efficiency.

### **5–7 Yes**

Your business has a solid foundation, but manual processes are likely slowing productivity and creating unnecessary operational costs.

### **0–4 Yes**

Your team is spending too much time moving data instead of moving the business forward. Order processing automation, ERP integration, and EDI can significantly reduce manual work and improve scalability.

## Final Reflection

Ask yourself these five questions:

- How many employees touch the same order before it ships?
- Where is data entered more than once?
- Which tasks are repetitive and rule-based?
- What happens if your order volume doubles next month?
- Are you scaling your business—or just scaling manual work?

If these questions reveal multiple bottlenecks, it's likely time to simplify your workflows before adding more people. Successful SMBs don't just process more orders, they build systems that let the same team handle more volume with fewer manual touchpoints.