Order Management System selection: 43 smart questions to ask a vendor

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Don't get trapped by a system that doesn't give you enough control over how you manage orders and inventory, and can't be extended to meet your growth goals or future needs.

When it comes to Order Management Systems (OMSs), the most common questions we get are around basic platform functionality, time to implement, and of course, price. And they're all good to ask. But if you want to avoid the traditional pain points of an on-premise solution (like rigid processes and long implementation times) and successfully navigate the new world of cloud and headless order management, other questions are important too. So here are 43 to consider adding to your list, broken into seven categories:

- Inventory availability
- Flexibility and extensibility to support unique use cases
- Selling globally
- Multi-brand / banner support
- Implementation time and approach
- Cloud architecture and experience
- Scalability

Let's dive in.

Inventory Availability

Real-time inventory availability with fulfillment options

Questions to Ask:

1. Can the solution provide real-time (not cached data) pickup/delivery availability for multiple products on the Product Listing Page (PLP) / Search results?
2. If so, for how many items?
3. And what is the latency?

What to look for:

Vendors love to brag about ultra-fast response times for inventory availability data. But it's important to understand the details so you can evaluate like-for-like use cases. Especially when it's 'before the buy button'. When they say 'inventory availability' are they talking about a simple 'is it in stock or not' response? And is that data cached in the commerce platform, or called live from the OMS? Are they also making live sourcing decisions for both delivery and pickup options to ensure your promises are accurate?

Number of fulfillment locations (nodes)

Questions to Ask:

4. Are there any technical limitations on the number of inventory locations (fulfillment nodes) the solution can manage?

What to listen for:
While most enterprise vendors can handle a lot of locations, some solutions have technical limitations. So it's important to double check.

Inventory data processing

Questions to Ask:

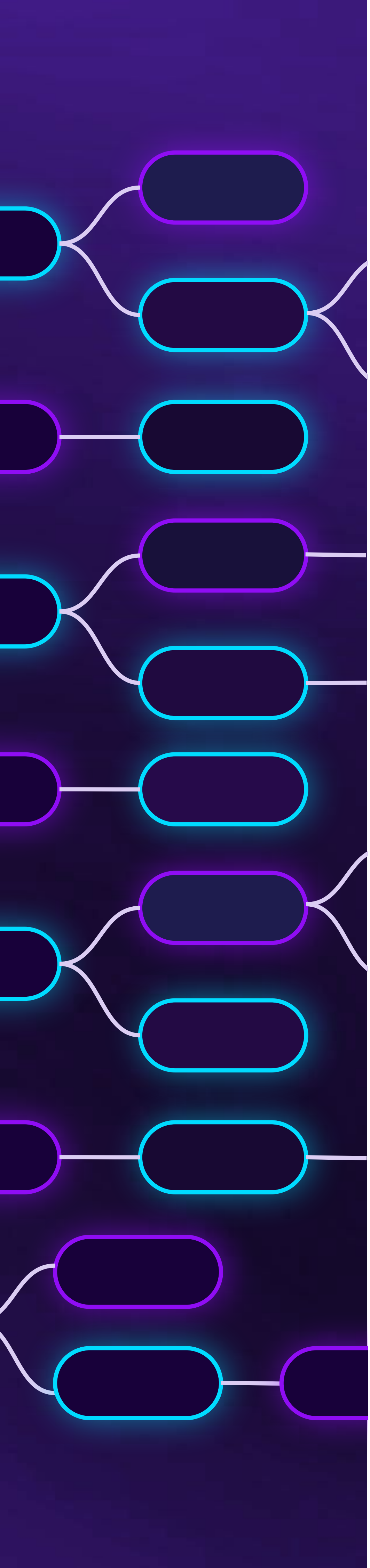
5. How are inventory position updates processed?
6. Can you consume Point of Sale (POS) event data as well as inventory data from an ERP?
7. When we send you inventory updates are you able to filter out the ones that haven't changed to speed up processing?
8. How often do your customers typically send updates?

What to listen for:
When people think about an order management system, they usually think in terms of order processing. But inventory processing is just as important - if not more so. Does the vendor support inventory updates as live event streams as well as batch files? When updates are received, is there any intelligent processing to enable faster updates?

As ecommerce grows, regular inventory updates for faster moving items becomes more important. Especially as it you may want to use that data not only to update your digital commerce channels, but your advertising as well. Some organizations with electronic shelf labels are also moving to intraday pricing updates on high velocity SKUs. This makes accurate inventory data even more important as an input to the pricing engines that generate price recommendations.

Flexibility and extensibility to support unique use cases

Questions to Ask:
Think about one or more unique use cases your business needs to support, then ask:



9. Is this a use case you could demonstrate to us? If so, how long would it take?
10. Can you provide examples of complex sourcing logic you've supported? How long did it take to implement that customer?
11. How can fulfillment/sourcing logic be updated to meet unique requirements?
12. How frequently can we update our business processes? Can we and/or our partners update it ourselves without involving you? If not, what is the cost structure?
13. Can you describe any sustainable fulfillment / low-carbon delivery use cases that customers have deployed?
14. Can you provide examples of how customers have changed the UI to support unique use cases? How long would it take to implement those changes? What is the cost structure?
15. Can the workflows be extended to incorporate third party data in the business logic?

What to listen for:

Every business has at least some unique use cases. Chances are yours does too. But supporting unique use cases isn't just important for today. Think about how much change has occurred over the past few years. It's a good bet that the use cases you need to support tomorrow may be different again. Want to incorporate data from a planning and forecasting or customer loyalty platform into your sourcing logic? Make sure the solution is flexible enough to not only support your needs today, but your future needs as well. It's also important to understand who can do that work.

While a vendor may offer some options via UI, often they are very limited. So who can make other changes to sourcing and fulfillment logic? Is it the vendor only? Or do they empower partners, and you as the customer to make changes yourselves?

Why is this important? Because when changes can only be made by a vendor they are often expensive, and implementation timelines can be constrained based on vendor resource availability. This drives up Total Cost of Ownership (TCO) and time to ROI. It can also significantly increase implementation costs after contracts are signed if the details of the use cases you need to support aren't fully understood until you start discovery.

What's more, if you're reliant on a vendor to make changes, it's harder to conduct smaller experiments over time and adjust quickly based on the results. So make sure you go into enough detail around use cases and the process for rolling out updates during your vendor evaluation process.

Headless Deployment

Questions to Ask:

16. How can the functionality to change/modify orders be exposed to other systems (e.g. call center, clienteling app, point of sale) through APIs?
17. Can you provide real-world examples of headless implementations?

What to listen for:
Headless order management? Yes, it's a thing. Some organizations would prefer to have staff use their existing applications for customer service across a range of touchpoints. If that's you, make sure you ask if the vendor's solution can support a headless deployment, and if they have customer examples they can share.

Selling Globally

Questions to Ask:

18. In which countries do customers use the solution today?
19. What is the greatest number of countries a single customer has rolled out?
20. How does the solution support different fulfillment logic for each country or region?
21. Can you provide examples of the difference in implementation time between the first country and subsequent country rollouts?

What to listen for:
If you sell globally, or plan to in the future, you want a solution you know can handle it. For example, you may need to support different sourcing rules by country or region. Different languages. Currencies displayed in local format. Or need to trigger payments at different times during the order lifecycle. You'll also want to understand how the vendor's solution can accelerate future global rollouts. Can logic or templates from one region be used to fast track rollouts in another?

Multi-brand / banner support

Questions to Ask:

22. Do you have customers that have multiple brands or banners using your product?
23. How does the solution support different fulfillment logic for each brand / banner?
24. How does the solution enable faster rollout of subsequent brands / banners?
25. Can you provide examples of the difference in implementation time between the first brand / banner and subsequent brand/banner rollouts?

What to listen for:
If acquisition is part of your growth strategy, you'll want to understand how the solution can support multiple brands. Would each brand have to be a separate implementation, or is the architecture of the solution designed to support more than one brand? Can the solution support sharing inventory pools across brands (to enable, say, cross brand promotions) but still support unique fulfillment logic for each? Can logic or templates created for one brand be used to fast track onboarding another?

Implementation time and approach

Questions to Ask:

26. Do you recommend a phased approach to rollout?
27. If taking a phased approach to rollout, where do you recommend we start?
28. What is the average implementation time for small, medium and large projects? Can you provide some examples of the complexity of large projects?
29. What is the typical implementation time for a company of our size and complexity? Can you provide examples of similar projects?
30. What percentage of implementation projects are completed by a partner? Can I implement this myself?

What to listen for:
This is super important. The faster you go-live, the faster you get a Return on Investment (ROI). And have your project deemed a success by the rest of the business. And there are three key things to listen for:

- **Phased approach** - This an area where cloud-native OMS solutions have a huge advantage. They can be rolled out in phases. In fact, if a vendor doesn't recommend a phased, or Minimum Viable Project (MVP) approach, it's a red flag.

Look for vendors who recommend you start with your biggest pain point. Maybe it's inventory availability accuracy to prevent overselling and out of stocks. Or maybe you have complex sourcing rules or manual steps in the order lifecycle you need to automate.

- **Estimates based on real-world examples** - Lots of IT projects take too long or cost too much. Listen for real world examples of how long it took from project start to go-live for companies with similar complexity to yours.
- **Partner implementations** - If a vendor has partners doing implementations it means two things. Firstly, they know how to enable others. This means they can enable your team to run the system long term if that's your goal. Secondly, because they want you to be successful and happy, they will make sure partners don't over inflate their bid for services work. And they will want to make sure the project is delivered on time. When a vendor does their own implementations, they don't have the same incentive to keep project duration to a minimum. Or limit scope for an MVP. The result? It often leads to higher overall project costs, and delays your go-live and ROI.

Cloud architecture and experience

Cloud Architecture

Questions to Ask:

31. How is your system architected? What services do you use from your cloud provider and how do they enable you to provide a better service?
32. Do you offer both multi-tenant and single-tenant environments? How long would it take if we wanted to migrate from a multi-tenant to a single tenant environment in the future?
33. How long would it take if we wanted to migrate from a multi-tenant to a single tenant environment in the future?
34. What integration patterns do you support?
35. How often do you deploy updates? How much downtime is involved?
36. What redundancy measures are in place? If a whole data center goes down, would it impact our business? Would there be downtime involved?
37. Are you able to service our business data centers in other geographic regions in the case of an extended disaster? (e.g., if there is a big storm, earthquake, or similar?)

What to listen for:

A truly cloud-native solution isn't just containerized software in the cloud. It takes full advantage of all the cutting edge services and databases provided by the cloud vendor. So ask about those services and how they will benefit your business.

What's another sign of a strong cloud-native architecture? The ability to move from one type of environment to another (e.g., multi-tenant to single tenant) without any downtime. Not because you will need to, but because it demonstrates a vendor's cloud maturity. That they're thinking about how to best maintain their environments and service their customers long term.

When it comes to integration patterns, more is better. Additional patterns will provide you with more integration options. Ask whether they offer REST APIs that support both single record processing and batch multi-record processing. What about GraphQL? And webhooks?

Zero downtime updates should be standard. Using modern deployment methods, there is no reason for downtime during regular release cycles or the deployment of hotfixes. In fact, the more often the releases, the better. Small regular releases are far less risky overall than a quarterly big bang approach. Modern SaaS companies deploy new code daily. That said, there may still be some scheduled maintenance required. An example? For upgrading the underlying infrastructure to the cloud provider's latest and greatest. But not many.

When it comes to redundancy, it's all about meeting uptime SLAs. In the old on-premise software world, this meant understanding a vendor's disaster recovery plans. But modern cloud architecture is different. That's why redundancy questions can be so revealing. Cloud-native vendors will be running on multiple separate data centers across multiple geographic regions. And their solution will be architected in such a way that if one data center goes down, transactions will continue to flow through another, so there's no impact to your business. Just like regular releases, data center outages should be a zero downtime experience.

Cloud Experience

Questions to Ask:

38. How many customer implementations are using your SaaS/Cloud-native solution (not just on-premise hosted in the cloud)?

What to listen for:
Some vendors are still in the process of migrating their customers to the cloud. Others have been known to "cloud-wash" their software, or misuse the phrase 'cloud' to describe older product lines. Some still can't support complex requirements with their SaaS offerings. So be sure to ask about their cloud experience. And make sure you ask any references provided by the vendor which version they're using.

Scalability

Questions to Ask:

39. Does the solution scale dynamically? If so, can you provide real-world examples of that scaling?
40. Did you have any service outages during the peak period last year?
41. Can you provide real-world examples of peak season volumes?
42. What is the maximum number of inventory position updates a single customer sends to your order management in a 24 hour period? How often are they sending updates?
43. What investments have you made in cloud scalability over the past 24 months?

What to listen for:
It's easy for any vendor to say their solution scales dynamically, but you want to understand what that means in the real world. What have they scaled from and to? And don't just ask about orders, because they are a poor indicator of scale. For every order there are many more requests for stock availability, fulfillment options. Orders may have multiple line items and shipments. These could trigger tens or hundreds of API calls, depending on complexity of the order lifecycle. So ask for examples of scale, and about peak season uptime and volumes from the previous year.

Also, it's not just about stock checks and orders. It's also the inbound inventory updates coming from other systems like an ERP, or transactions from Point of Sale (POS) systems. Or even third parties, like drop ship vendors or 3PLs. How much volume are the vendor's customers sending today?

And lastly, ask about how they're investing in scalability. Are they on the latest and greatest databases and services offered by their cloud provider? Ask what actions they have taken to ensure peak performance in the future.

Summary

There are many OMS vendors today. They all have their strengths and weaknesses. Their goal is to sell you their product. And they've developed great messaging to win you over. Your job is to look past the shiny veneer, sift through them all, and find the one that's the best fit for your business. Both now, and in the future. Hopefully these questions will help. Good luck!

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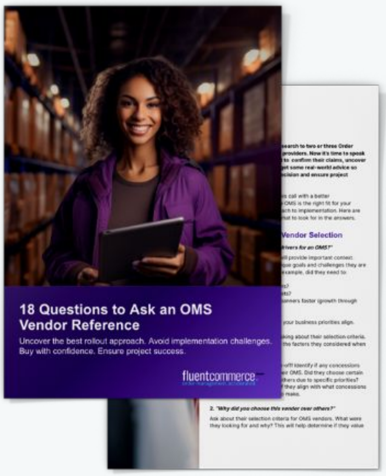

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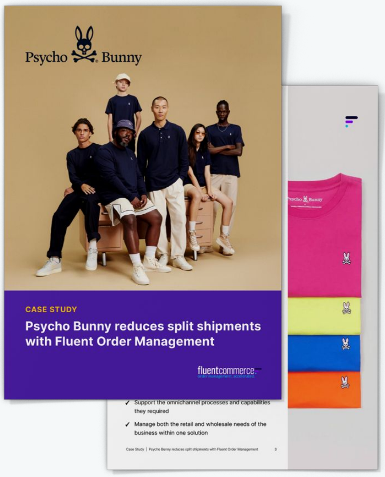

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