18 Questions to Ask an OMS Vendor Reference

Uncover the best rollout approach. Avoid implementation challenges. Buy with confidence. Ensure project success.

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You've narrowed down your search to two or three Order Management System (OMS) providers. Now it's time to speak to their customers. You want to confirm their claims, uncover any hidden challenges, and get some real-world advice so you can make an informed decision and ensure project success.

You should walk away from this call with a better understanding of whether the OMS is the right fit for your business. And the best approach to implementation. Here are some questions to ask, and what to look for in the answers.

Business Drivers & Vendor Selection

1. *"What were the business drivers for an OMS?"*

The answer to this question will provide important context. Different businesses have unique goals and challenges they are addressing with an OMS. For example, did they need to:

- Reduce canceled orders?
- Expand into new markets?
- Onboard new brands/banners faster (growth through acquisition)?

This will help you figure out if your business priorities align.

Expand on this question by asking about their selection criteria. This will help you understand the factors they considered when choosing their OMS.

There's almost always a trade-off! Identify if any concessions were made when selecting their OMS. Did they choose certain features or capabilities over others due to specific priorities? This will allow you to assess if they align with what concessions you may or may not be able to make.

2. *"Why did you choose this vendor over others?"*

Ask about their selection criteria for OMS vendors. What were they looking for and why? This will help determine if they value

similar things as you. Ask if there were particular capabilities they were looking for. And if cost, time to market, scalability, and flexibility were contributing factors.

3. *"Would you say your goals have been achieved?"*

Ask about their business goals and success criteria. Has the product helped them meet their overall business goals?

Understanding this will give you an impression of the OMS's impact on their business. And whether it can help yours.

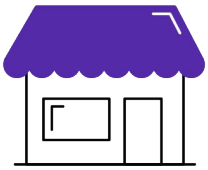
Use Cases

4. *"What are the primary use cases you support using your OMS?"*

An OMS can be used by different businesses in different ways. So ask about which use cases their OMS supports today, and if they are planning to expand those use cases in the future. Some use case examples include:

- Accurate, unified view of inventory availability data
- Showing availability on the PLP, PDP, and during checkout
- Soft reservations on items in the cart
- Complex sourcing and order orchestration logic
- Managing store fulfillment (pick, pack, ship, and pickup)
- Managing returns

There is no such thing as 'the perfect OMS'. There is only 'the best OMS for your business today'. One that is flexible enough to remain your OMS for many years.



5. *"Where there any use cases that came up in discovery that the solution can't support?"*

Some OMS's are very opinionated in how you run your business. They have pre-built workflows and UI that weren't designed with flexibility in mind, and are expensive to customize. This question will help you understand any limitations that may constrain your options in the future.

6. *"Are there any use cases that could only be supported with the vendor's on-premise solution rather than SaaS offering?"*

All OMS vendors have cloud offerings. However, not all vendors can support all use cases with their cloud-native SaaS solutions. Some vendors haven't migrated all their on-premise product functionality to their cloud based products.

7. "Are you using your OMS to support multi-channel or multi-brand selling?"

Different businesses face unique challenges. Especially when they expand into new geographic markets or grow through acquisition. Each market or customer base they serve is different. And they need ways to optimize operations, get the most out of their stock, and reduce the cost to serve.

Do you own multiple brands or banners, or sell globally (or have plans to)? If so, it's important that you select an OMS that will help you achieve seamless cross-border and cross-brand commerce. If the reference operates globally, ask if they have rolled out or are planning to rollout any of the following:

- Configuring fulfillment logic by brand or region
- Using templates for faster rollout
- Offering convenient cross-brand shopping, allowing customers to pick up or return orders at any of their locations.
- Segmenting inventory by brand or region
- Supporting local languages

Or any other use cases that are relevant to your business.

Implementation

8. *"What approach did you take to implementation and why? Were you able to take a phased approach to rollout?"*

Was it a stand alone implementation? Or part of a larger digital transformation project? Did they take a 'big bang' approach to go-live? Or did they roll out in smaller phases? If a phased approach, where did they start? If they couldn't roll out new features incrementally, why not? Was it a limitation of the system, or due to internal reasons?

Why is this important? Not all OMS solutions can support a phased go-live approach that starts by solving your biggest pain points first. Yet, if your biggest challenge is accurate inventory availability, by rolling this out first, you can get an earlier return on your investment. Not to mention reduce business risk.

Also, find out if they were happy with their approach or if they'd change anything.

9. *"Were you happy with the vendor's responsiveness and guidance during the project and beyond?"*

Timely responses from a vendor are essential for project success. Did they feel the vendor was responsive? Did they feel supported and like the team had the expertise to answer questions and guide their project to success? Did they help uncover valuable new use cases? Or suggest creative solutions to implementation challenges?

10. *"What other systems did you integrate with? Did you use any connectors?"*

Gaps in integrations can show up as gaps in the customer experience. A solution that's difficult to integrate with can lead to operational inefficiencies. And even worse, potential data discrepancies. Find out if the OMS has been integrated with your tech stack before. This will let you know if the integration

patterns supported by the OMS are flexible enough to support your integration use cases.

11. *"Was the project delivered on time and on budget, and what was the implementation process like?"*

On time delivery is critical to ROI. So learning if a product has been implemented on time in the past is essential. But there are many factors to consider.

If it was on time, what was the timeline? Did they break the project into phases, and if so, what was the scope for phase one? Was there a difference in delivery timelines for each phase?

If it wasn't delivered on time, dig deeper. Many things can derail an IT project. Sometimes it's scope creep. A project was put on hold. Or it could be dependencies on another project or implementation. So make sure you understand the full context behind the delivery timeline.

12 *"Is there anything you would have done differently?"*

Gathering lessons learned from others is one of the best ways to ensure your own project's success. It will help you foresee potential implementation and integration challenges so you can avoid them on your project.

Having this knowledge will also help you set realistic expectations for your internal stakeholders and meet their expectations.

13 *"Do you have any other advice or learnings you could share on your OMS project?"*

Take notes! This is your opportunity to gain helpful advice from someone that has already been through a real-world OMS implementation. What are their tips for a successful implementation and vendor relationship?

Flexibility & Scalability

14. ***"Would you say the system is flexible and adaptable to your requirements? Can you describe any unique use cases you've rolled out?"***

We live in a world of constant change. Digital teams are constantly rolling out new front end experiences, and often backend systems struggle to keep up with the pace of innovation. Think about how many new use cases you'll need to support over the next 3-5 years.

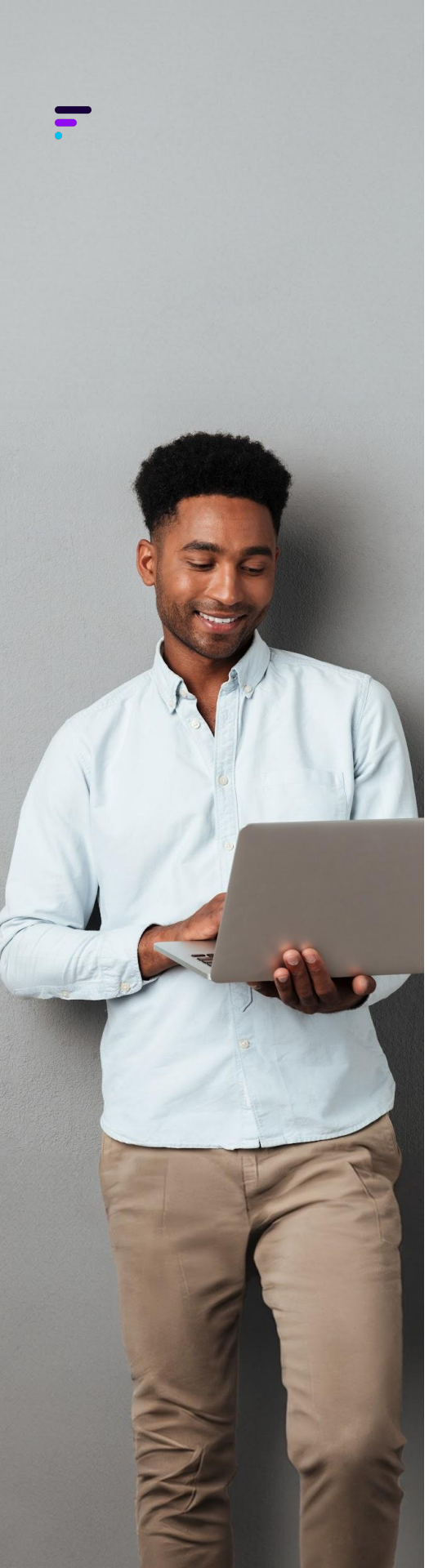
Will the new OMS provide the flexibility you'll need to innovate quickly? Now is the time to find out. Ask the reference if they've rolled out any unique use cases and how well the system has been able to support them. And ask about the average time it takes to make changes. Are they able to deliver business value faster than they were before?

15. ***"Would you say the platform is scalable enough to meet your peak season demand and future growth aspirations?"***

Can the system handle your loads? Both now and in the future? Then it's important that you use this question to find out if this OMS platform can scale.

Ask how it has performed in peak business periods or during unexpected spikes in demand. Was it able to scale to meet the increased volume of inventory position updates, product availability lookups, and orders while remaining stable and reliable?

Make sure you list down your own reasons and expectations by priority and have a consensus with the stakeholders participating in the selection.



16. Did you have to adapt your business processes to the solution, or was the solution flexible enough to adapt to your business processes?

Every organization has unique and often complex business processes related to order management, stock management, customer service, and delivery. It's important to ensure that the OMS solution being referenced aligns with your current processes as closely as possible. If the vendor reference had to significantly adapt their processes to fit the OMS, it could indicate that the solution may not provide the flexibility you need.

An OMS should not only meet your current needs but also be adaptable for future growth and changing business requirements. An inflexible solution may indicate limitations in scalability or the ability to accommodate future changes in your business.

Results

17. *"What KPIs do you measure for OMS?"*

Ask what metrics they are using to track the ROI of their OMS. Do they have key performance indicators they need to meet? The benefits of this question are twofold. You will learn if the reference's KPIs align with your own, and you may also learn some hidden value you hadn't previously considered.

Some common ones include:

- Canceled order rate
- Split shipment rate
- Fill rate (percentage of orders delivered on time, in full on the first attempt)
- Average time to deliver an order
- Time to onboard a new brand/banner
- Time to rollout to a new country or region
- Time to rollout a new fulfillment offering (e.g., Mixed basket—offering both delivery and pickup, or multiple delivery addresses, in a single order)

18. *"Has the project delivered a positive return on investment?"*

Asking whether they have seen a positive ROI on their OMS is crucial in assessing if the benefits of the system have outweighed the cost. How has the OMS delivered value? Has it:

- Reduced canceled orders to close the gap between demand and revenue
- Increased online conversion rates (by showing accurate inventory availability throughout the shopper journey)
- Reduced delivery costs and/or split shipments
- Improved fill rate
- Increased rate of innovation
- Reduced total cost of ownership
- Increased operational efficiency

In addition, ask about some of the hidden values of an OMS project. If canceled order rates have dropped, have they also seen a drop in contact center costs? By implementing a modern tech stack, have they found it easier to attract new talent to their teams? Understanding these qualitative benefits will provide you with a more holistic view of the system's impact, and more value to communicate to your internal stakeholders.

The reasons to choose an OMS vary significantly from one customer to another and sometimes vary throughout the selection journey. Make sure you list down your own reasons and expectations by priority and have a consensus with the stakeholders participating in the selection. This will also be beneficial after the implementation is done to measure your own success.

There is no such thing as 'the perfect OMS'. There is only the best OMS for your business today. And one that is flexible enough to remain with you for many years to come.

Learn more about the value of phased OMS rollouts.

Contact us today!

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