

How to use: go through each section and check every box that applies. Tally your score at the end. Any unchecked box is a documented operational gap.

Planning Purchasing Sync

- 1 ☐ Does purchasing get automatic alerts when engineering changes order quantities?
- 2 ☐ Can a supplier reach purchasing directly without routing through engineering first?
- 3 ☐ Does any department change order volume without a cross-department signoff step?
- 4 ☐ Is there a single shared forecast file engineering and purchasing both update?
- 5 ☐ Would a 50% quantity cut get flagged before the supplier calls to confirm it?

Supplier Quality Data

- 6 ☐ Does leadership see supplier quality data before approving next year's cost cuts?
- 7 ☐ Is there a process stopping cost reduction targets from overriding quality flags?
- 8 ☐ Do quality complaints reach executives before they turn into legal claims?
- 9 ☐ Is supplier performance reviewed on quality, not just price, every renewal cycle?
- 10 ☐ Can procurement approve a discount without quality team visibility into the tradeoff?

Department Optimization Checks

- 11 ☐ Does any department get rewarded for metrics that hurt another department's output?
- 12 ☐ Can two teams each hit their targets while the overall order cycle gets slower?
- 13 ☐ Is there a standing meeting where department heads see each other's full numbers?
- 14 ☐ Does your org chart assume departments will collaborate without any shared process?
- 15 ☐ Would you know if a win in one department created a cost in another?

Sales Operations Alignment

- 16 ☐ Can a sales rep promise a feature without product team confirmation first?
- 17 ☐ Does operations get notified the same day a nonstandard promise is made?
- 18 ☐ Is there a documented process for correcting an overpromise before delivery fails?
- 19 ☐ Would leadership know a rep is overpromising before the customer complains?
- 20 ☐ Is there a written policy for apologizing to customers after a broken promise?

Inventory Systems Integrity

- 21 ☐ Are sales and inventory tracked in one connected feed, not two separate systems?
- 22 ☐ Can a customer order a product that is already out of stock on your site?
- 23 ☐ Are inventory discrepancies traced to a cause, or written off as a loss?
- 24 ☐ Does your system log who dispensed stock against what the books show?
- 25 ☐ Would overselling get caught before the customer receives a cancellation notice?

SCORING GUIDE

Score	Level	What it means
0 to 11	CRITICAL	Structural failures are actively destroying margin
12 to 19	MODERATE	Gaps in two or three areas that need immediate attention
20 to 25	STRONG	Systems are solid, focus on optimization

Book a free data audit at modonix.com/service. We identify your top 3 margin leaks in one session. Written by Ahmed Abuswa, Modonix.com