

FREE SELF-ASSESSMENT

Supply Chain Operations Health Checklist

A practical 40-point review for manufacturers, distributors, and growing operations teams

Use this checklist to identify operational gaps, prioritize follow-up, and decide where deeper analysis may produce the greatest service, cost, inventory, and working-capital impact.

Prepared by

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Practical supply chain operations support for manufacturers and distributors

How to Use This Checklist

Score each statement based on how consistently the practice is currently performed across the operation being reviewed. Use actual evidence - reports, system data, standard work, meeting records, or observed behavior - rather than intent alone.

0	Not in place	The practice is absent, informal, unknown, or cannot be supported with evidence.
1	Partially in place	The practice exists but is inconsistent, incomplete, reactive, or limited to part of the business.
2	Consistently in place	The practice is defined, routinely followed, measured where appropriate, and supported by evidence.

Before You Begin

- Choose a clear scope: one site, one business unit, or the full operation.
- Ask the people who perform the work to participate; leadership perception and daily reality may differ.
- Record short notes or evidence for low scores and disputed items.
- Do not treat the total score as a substitute for financial analysis, customer impact, or implementation difficulty.

Assessment details

Company / site:

Date:

Completed by:

Scope:

1. Inventory Health

Mark one score for each statement and add brief notes where context will help later review.

Inventory is segmented by value and movement (for example, ABC and fast/slow/non-moving).	☐	☐	☐	
Inventory accuracy is measured regularly through cycle counts or physical counts.	☐	☐	☐	
Aging, excess, obsolete, and at-risk inventory are reviewed on a defined schedule.	☐	☐	☐	
Reorder points, safety stock, and order quantities are based on current demand and lead times.	☐	☐	☐	
Inventory turns, stockouts, and working-capital exposure are tracked and acted upon.	☐	☐	☐	

Section subtotal: _____ / 10

Top issue or follow-up:

2. Demand & Replenishment Planning

Mark one score for each statement and add brief notes where context will help later review.

A repeatable demand-planning process is used instead of relying mainly on judgment or last year's sales.	☐	☐	☐	
Forecast accuracy and forecast bias are measured at a useful product or family level.	☐	☐	☐	
Sales, operations, purchasing, and finance use aligned assumptions when planning demand and supply.	☐	☐	☐	
Promotions, seasonality, new products, and customer changes are incorporated into planning.	☐	☐	☐	
Planning exceptions are prioritized so teams focus on the items with the greatest business impact.	☐	☐	☐	

Section subtotal: _____ / 10

Top issue or follow-up:

3. Purchasing & Supplier Performance

Mark one score for each statement and add brief notes where context will help later review.

Supplier performance is measured using on-time delivery, lead-time reliability, quality, and responsiveness.	☐	☐	☐	
Purchase orders are released from defined policies and reviewed for exceptions before commitment.	☐	☐	☐	
Supplier lead times, minimum order quantities, and pricing data are accurate and routinely updated.	☐	☐	☐	
Critical and single-source materials have documented supply-risk and contingency plans.	☐	☐	☐	
Supplier issues have clear owners, escalation paths, and corrective-action follow-up.	☐	☐	☐	

Section subtotal: _____ /
10

Top issue or follow-up:

4. Warehouse Operations

Mark one score for each statement and add brief notes where context will help later review.

Receiving, putaway, picking, packing, and shipping follow documented standard work.	☐	☐	☐	
Storage locations and slotting reflect item velocity, size, handling needs, and replenishment frequency.	☐	☐	☐	
Warehouse productivity, utilization, errors, damages, and safety indicators are reviewed regularly.	☐	☐	☐	
Inventory and transaction data are recorded accurately and promptly at each warehouse step.	☐	☐	☐	
Recurring congestion, travel, handling, and space constraints are identified and addressed.	☐	☐	☐	

Section subtotal: _____ /
10

Top issue or follow-up:

5. Order Fulfillment & Customer Service

Mark one score for each statement and add brief notes where context will help later review.

Customer orders are checked for inventory, capacity, credit, and delivery constraints before commitment.	☐	☐	☐	
Order cycle time, fill rate, on-time-in-full performance, and backorders are measured consistently.	☐	☐	☐	
Order priorities and allocation rules are defined for shortages or competing customer needs.	☐	☐	☐	
Customers receive timely, accurate communication when commitments or delivery dates change.	☐	☐	☐	
Returns, complaints, and fulfillment failures are categorized and used for root-cause improvement.	☐	☐	☐	

Section subtotal: _____ /
10

Top issue or follow-up:

6. Transportation & Distribution

Mark one score for each statement and add brief notes where context will help later review.

Transportation modes, carriers, and routes are selected using defined service and cost criteria.	☐	☐	☐	
Freight spend is visible by carrier, lane, mode, customer, and accessorial category where relevant.	☐	☐	☐	
Carrier performance is measured for cost, on-time pickup/delivery, claims, and responsiveness.	☐	☐	☐	
Loads and routes are consolidated or optimized when practical instead of planned shipment by shipment.	☐	☐	☐	
Accessorials, detention, claims, and recurring service failures are tracked and corrected.	☐	☐	☐	

Section subtotal: _____ /
10

Top issue or follow-up:

7. Data, Systems & KPIs

Mark one score for each statement and add brief notes where context will help later review.

Core item, supplier, customer, location, and lead-time master data have assigned owners.	☐	☐	☐	
Operational reports use consistent definitions and can be reconciled to source systems.	☐	☐	☐	
A focused KPI set connects service, cost, inventory, productivity, and cash performance.	☐	☐	☐	
KPIs include targets, trends, owners, review frequency, and documented follow-up actions.	☐	☐	☐	
Manual spreadsheets and workarounds are controlled, understood, and reduced where they create risk.	☐	☐	☐	

Section subtotal: _____ / 10

Top issue or follow-up:

8. Processes, Ownership & Continuous Improvement

Mark one score for each statement and add brief notes where context will help later review.

Critical supply chain processes have documented owners, roles, decision rights, and escalation paths.	☐	☐	☐	
Standard work is current, accessible, followed, and used when onboarding or cross-training employees.	☐	☐	☐	
Operating meetings focus on exceptions, decisions, owners, and due dates rather than status reporting alone.	☐	☐	☐	
Recurring problems are addressed through root-cause analysis instead of repeated short-term fixes.	☐	☐	☐	
Improvement work is prioritized by financial, service, operational, and implementation impact.	☐	☐	☐	

Section subtotal: _____ / 10

Top issue or follow-up:

Results Summary

Transfer each section subtotal below. The overall score provides a directional view; the pattern of scores and business impact matters more than the total alone.

1. Inventory Health	___ / 10	
2. Demand & Replenishment Planning	___ / 10	
3. Purchasing & Supplier Performance	___ / 10	
4. Warehouse Operations	___ / 10	
5. Order Fulfillment & Customer Service	___ / 10	
6. Transportation & Distribution	___ / 10	
7. Data, Systems & KPIs	___ / 10	
8. Processes, Ownership & Continuous Improvement	___ / 10	
OVERALL	___ / 80	

Directional interpretation

64-80 Strong foundation	Core disciplines appear established. Focus on lower-scoring sections, exceptions, and opportunities to improve cost, cash, or scalability.
48-63 Improvement opportunities	Several practices are present but may be inconsistent. Prioritize gaps tied to customer service, inventory exposure, capacity, and recurring cost.
0-47 Elevated operational risk	Foundational gaps may be creating avoidable service failures, cost, inventory, or management burden. A structured diagnostic and action plan may be warranted.

Your three highest-priority follow-ups

1. _____
2. _____
3. _____

Turn Findings Into Action

A checklist can reveal where to look. A structured assessment determines what is happening, why it is happening, what it is costing, and which actions deserve priority.

Supply Chain Operations Health Check

A focused review of inventory, planning, purchasing, warehouse operations, fulfillment, transportation, data, KPIs, and operating discipline - followed by prioritized, practical recommendations.

Schedule a complimentary discovery call

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Important note

This checklist is a general screening tool and does not constitute an audit, assurance engagement, legal advice, financial advice, or a complete operational assessment. Scores are directional and should be interpreted alongside business context, data quality, customer requirements, financial impact, and implementation constraints.