



# Phase Zero: The Most Important Step in an OMS Transformation

Before vendor contracts, demos, implementation.  
Phase Zero is where competitive advantage begins.

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Summarize with AI



## Executive Summary

An order management system (OMS) transformation is one of the highest-stakes technology decision that retailers make. It touches every channel, every fulfillment node and nearly every core enterprise system. Yet more than half of these programs underperform; not because of bad technology, but because critical architectural and strategic decisions were made too late, with too little information.

The challenge runs deeper than integration. Legacy OMS platforms have been customized over years to handle far more than order management, like pricing, promotions, B2B workflows and more. That landscape often doesn't map cleanly to a modern architecture where different systems own different capabilities. Without clear definition of what belongs inside the new OMS and what falls outside it, teams discover mid-build that entire capabilities need to be rehomed. Scope expands, timelines stretch and budgets overrun.



### 50%+

of large-scale tech transformations fall short of business expectations



### 7-10 yrs

average strategic lifespan of the right Order Management System decision



### 45%

average project overrun on large-scale technology projects

## The Case for Phase Zero

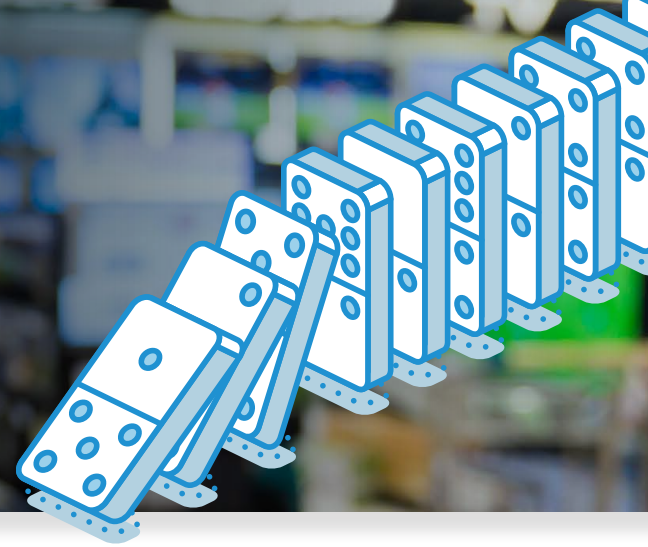
**Phase Zero** is a foundational decision framework that happens before contracts or implementation. It maps the gap between your current-state and target-state architecture, aligns business and IT stakeholders around a shared blueprint, flags integration risks, models total cost of ownership and evaluates your options (build, buy or hybrid) before you commit. It also defines how to structure the program and assesses organizational readiness: the roles, skills and capacity your team needs to execute.

The outcome is a technology choice grounded in your reality, a sequenced implementation roadmap and true alignment across commerce, supply chain, store ops, finance and IT. Phase Zero doesn't slow your transformation down. It prevents the costly rework and timeline extensions that do. Nextuple has refined Phase Zero across large OMS programs for retailers, grocers and 3PLs. We are OMS focused, vendor neutral and bring deep production experience across every major platform.

<sup>1</sup> [Bain & Company, Product Management: The Key to Unlocking Return on Your Software R&D Investment](#)

<sup>2</sup> [McKinsey & Company, Delivering Large-scale IT Projects on Time, on Budget, and on Value](#)

# Why Most OMS Transformations Underperform



OMS complexity is systematically underestimated and the instinct is to move straight to demos. But an OMS is not a standalone system. An OMS is an orchestration layer that *integrates with nearly every core enterprise platform*. An OMS touches your commerce platform, ERP, WMS, TMS, POS, payment systems and increasingly, AI and data platforms. When organizations skip the architectural groundwork, **the consequences compound across every one of these connections.**

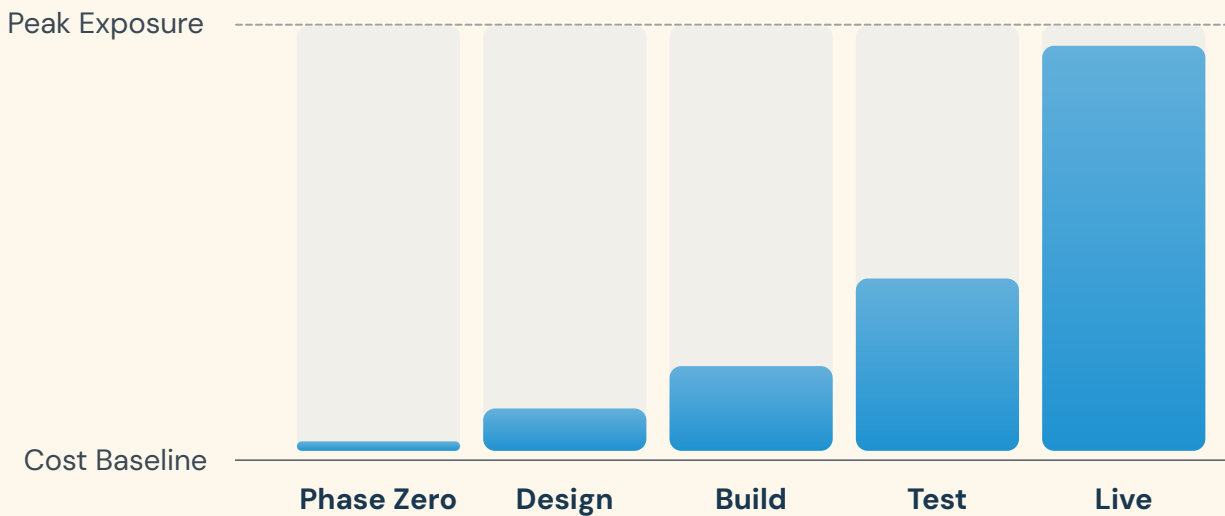
## What Goes Wrong Without Upfront Design

- 01 ROI and business case** → *drift from original projections*  
By the time the project goes live, the original business case may no longer hold. Stakeholder confidence erodes and the transformation is judged a disappointment even if it eventually delivers value.
- 02 Scope and ownership unclear** → *no agreement on system handling*  
Without upfront alignment, stakeholders carry different assumptions about which capabilities belong to the OMS, which belong to the WMS or ERP, and which fall into gaps between systems.
- 03 OMS boundaries are undefined** → *new architecture is never a 1:1 mapping*  
Legacy platforms have absorbed pricing, promotions, B2B workflows and custom apps over the years. Without clarity on what belongs inside the new OMS teams discover mid-build that entire capabilities need to be re-homed.
- 04 Project timelines** → *stretch, sometimes by months*  
Unplanned scope additions cascade through dependent workstreams. A 6 month implementation quickly becomes 10 months, with mounting costs and organizational fatigue.
- 05 Integration assumptions** → *become expensive surprises mid-project*  
A single missed API dependency between your OMS and another system can require weeks of unplanned development and testing, which can multiply the cost of identifying it upfront.
- 06 Underscoped change management** → *unprepared for how much will change*  
An OMS transformation can change how stores fulfill, how teams collaborate and how decisions get made. Without assessing organizational readiness upfront, training gets rushed, adoption stalls and teams revert to old workflows.

# The Cost of Discovery Grows Exponentially

The later that architectural misalignment is discovered, the more costly it becomes to correct. Switching platforms midstream is rarely viable—making Phase Zero not an overhead, but insurance.

## Costs to Correct Misalignment by Project Phase



\*Based on Nextuple's experience across multiple large-scale OMS transformation programs.

# What Phase Zero Actually Includes

Phase Zero is not a preliminary workshop. It is a structured decision framework that precedes vendor contracts and implementation. It is designed to protect your investment and eliminate costly surprises before they happen.

## ROI and Business Objectives

Define measurable outcomes tied to real KPIs—not feature wishlists.

## Architecture and Process Blueprint

Deep assessment of your existing systems and future-state enterprise architecture blueprint.

## Cross-Functional Requirements

Commerce, supply chain, store ops, finance, and IT aligned from day one.

## Total Cost of Ownership Modeling

True total cost of ownership across licensing, implementation, and operations.

## Program Structure Definition

Phasing, sequencing and dependencies mapped to your business priorities and organizational capacity.

## Integration Impact Analysis

Every system connection identified, scoped, and risk-rated upfront.

## Data & AI Readiness

Evaluate your data maturity, quality and infrastructure to determine readiness for AI-powered capabilities

## Change Management Framework

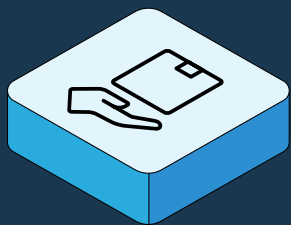
Assess organizational readiness, define the roles and skills needed, and plan for adoption.

## Implementation Roadmap

Phased, executable plan sequenced around business priorities.

### Key Principle

Vendor selection should be the output of Phase Zero, not the starting point. Most organizations narrow to 2 or 3 vendors and retrofit requirements around those platforms. Phase Zero inverts that: requirements, architecture and approach (build, buy or hybrid) come first, with vendor selection following as a natural conclusion.



# What Phase Zero Ultimately Delivers



## Right Technology Decision

Technology decisions grounded in your architecture, complexity and roadmap, not industry hype or demo quality. Phase Zero produces a structured evaluation that scores each option (build, buy or hybrid) against weighted criteria specific to your organization:

- **Strategic alignment** with your business model
- **Cultural fit** with your organization
- **Product capability** against prioritized use cases
- **Scalability** for future growth
- **Total cost of ownership** realistic and fully modeled
- **Integration compatibility** across your enterprise stack
- **Composability and extensibility** for incremental modernization
- **Organizational readiness** to execute and sustain the transformation

The right approach for one retailer may be the wrong one for another.

## Architecture Blueprint & Roadmap

A target-state architecture that defines what belongs inside the OMS and what falls outside, paired with a phased implementation plan aligned to your priorities and capacity. This sequence illustrates a common pattern; actual phasing is tailored to your starting point:

- **Inventory Visibility:** Foundation layer—know what you have, where
- **Sourcing Logic:** Routing rules, ATP, cost-to-serve optimization
- **Store Enablement:** BOPIS, SFS, curbside, return flows
- **Channel Expansion:** New channels integrated rapidly
- **AI Optimization:** ML-driven promising, routing, reconciliation

Clarity entering the implementation phase prevents reactive firefighting.

# Why Nextuple for Phase Zero

Built exclusively for Order & Inventory Management since day one.

## Deep OMS Expertise

Decades of real-world experience across IBM Sterling, Manhattan, Kibo, Blue Yonder and others, in production retail environments, not just consulting engagements. We know these platforms inside and out: their capabilities, their limitations and what it actually takes to implement them. We also know what it takes to build, having developed custom microservices and composable solutions alongside major OMS platforms.

## Vendor & Approach Neutral

We're here to make sure you make the right decision before you commit. Whether the right answer is a full platform, a composable strategy, a hybrid architecture or a retailer-led custom build, we guide you there through structured evaluation balancing strategic fit, TCO, integration complexity and your long-term roadmap.

## Methodology Refined in the Field

Phase Zero is not theory. It is a discipline refined across multiple large-scale OMS programs, from mid-market specialty retailers to enterprise grocers and 3PLs, spanning full platform implementations, composable modernizations and custom builds.

## Platforms We've Implemented & Evaluated



and more...

## Capabilities We've Help Build

FULLFILLMENT

ORCHESTRATION

PROMISING & INVENTORY



Start your OMS Transformation Journey the Right Way.

Contact Us

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