

Improving Purchase Order Visibility and Sourcing for a Seasonal Retail Leader

The client, a \$2B fast-turn seasonal retailer, operates one of the most complex and time-sensitive retail supply chains. Its highly seasonal business model combines compressed selling windows with a global vendor base, requiring close coordination from sourcing and purchase order (PO) creation through production and inbound logistics. As the business grew, increased product complexity and evolving compliance requirements exposed structural limitations across its sourcing and PO lifecycle.

At the core of the challenge was limited end-to-end visibility from buy initiation through vendor production and inbound shipment. Multiple systems supported discrete parts of the process but weren't fully integrated, leaving teams heavily reliant on manual workarounds, spreadsheets, and email-based coordination to bridge gaps between systems.

Vendor onboarding required significant manual effort while PO creation lacked consistent processes and visibility into downstream production realities. Production visibility was also limited, and distribution center (DC) inspection and financial chargeback processes were fragmented.

To address these challenges, the client partnered with Clarkston Consulting to conduct an independent, end-to-end assessment of its sourcing workflows and PO lifecycle. The assessment identified current-state pain points and incorporated perspectives from teams across the organization. Clarkson then helped define a future-state vision aligned with the client's operational needs, providing a practical path toward a more integrated PO lifecycle with clearer visibility and operational control across the supply chain.

Retail Case Study

PROJECT OVERVIEW



INDUSTRY



Retail

PRODUCTS AND SERVICES



Halloween costumes,
accessories, props, and
animatronics

PRIMARY OBJECTIVES

- Conduct an end-to-end assessment of sourcing workflows and purchase order lifecycle processes from buy initiation through inbound logistics
- Identify operational pain points, inefficiencies, and data gaps across merchandising, sourcing, logistics, and finance functions
- Benchmark current capabilities against industry best practices for PO visibility, vendor collaboration, and supply chain execution
- Define a future-state vision for integrated sourcing workflows and PO lifecycle visibility
- Develop a prioritized roadmap of near-term and longer-term improvements aligned to business impact and feasibility

RESOLUTION

- Led 48 cross-functional stakeholder interviews across 17 stakeholder groups to capture current-state processes and understand key interdependencies
- Mapped detailed “as-is” workflows across the PO lifecycle, from vendor onboarding and buy readiness through production tracking, inbound shipment, DC receiving, invoicing, and chargebacks, to highlight gaps in visibility and data flow
- Benchmarked current capabilities against leading practices in supply chain planning and vendor management, with a focus on PO lifecycle visibility
- Synthesized pain points into key themes, including disparate systems, manual processes, PO volatility and flow disruptions, limited production-to-inbound visibility, and reactive vendor management
- Defined a future-state vision focused on improving productivity through streamlined workflows, automation, and earlier, more disciplined planning
- Emphasized stronger vendor collaboration and visibility from PO through factory and DC PO
- Developed a prioritized roadmap of actionable recommendations, including quick wins for near-term impact and strategic initiatives for long-term transformation

KEY BENEFITS

- Established an enterprise-wide view of current-state sourcing and PO lifecycle processes, creating greater alignment across teams
- Identified critical gaps in visibility, workflow automation, PO creation and change processes, and vendor collaboration, providing a foundation for targeted improvements
- Delivered actionable recommendations to streamline vendor onboarding and improve PO accuracy, with additional focus on production and shipment visibility
- Enabled leadership to prioritize initiatives based on expected impact and implementation effort while accounting for seasonal business needs
- Defined a scalable roadmap to reduce manual effort and strengthen vendor collaboration to enable a more responsive supply chain
- Positioned the client to improve on-time delivery and reduce expedited freight costs

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