

Executive Summary: Revenue Operations & Process Integrity Audit

Overview

A comprehensive five-month audit was conducted to quantify operational friction within the order-to-cash lifecycle. By aggregating fragmented data into a centralized Power BI reporting suite, the audit identified a significant revenue leak and established a roadmap for systematic stabilization toward a 10% KPI target.

Critical Findings

- **Target Variance:** The current Average Monthly Error rate stands at 36.52%, which is 265% higher than the established organizational target of 10%.
- **Primary Friction Drivers:** Root-cause analysis pinpointed that 33.0% of all errors are driven by Pricing Mismatches. While a majority of vendors utilize automated ePricing, the high error rate suggests a breakdown in one of three critical layers: Data Latency (30-day update cycles), Process Decentralization (reliance on individual team updates), or Manual Exceptions (special quotes outside the automated system).
- **Secondary Leakage:** "Email: Missing Quote or Items" accounts for an additional 19.8% of friction, meaning over half of all process failures are concentrated in just two subcategories.
- **Process Drift:** September marked the audit's performance floor with a 40.0% error rate.

Operational Interventions & ROI

Beginning in November, a series of strategic small pivots — including weekly notification emails and team meetings — were implemented to address the identified pricing and documentation gaps. These targeted architectural changes successfully drove the error rate down to 31.71% in December, a 26.15% improvement over the September peak.

Strategic Conclusion

The audit proves that the high error rate is a systemic workflow failure rather than a volume-capacity issue, as error percentages remained high even during lower-volume months. The downward trend established in Q4 validates the "surgical" approach to process documentation and provides a clear path toward achieving audit-ready metrics and the 10% target goal.