



Independent Advisory Practice of
Wolfe Integration Systems, LLC

INDEPENDENT TECHNOLOGY • DATA • AI ADVISORY FOR HOME FURNISHINGS RETAILERS

Beyond the POS: Technology Ecosystem Scorecard

A diagnostic tool to identify where POS, CRM, traffic, marketing, reputation, and reporting data stop working together.

THE WRA™ EXECUTIVE TOOLKIT — VOLUME 1: RETAIL GROWTH DIAGNOSTICS | ASSESSMENT 1 OF 3
WRA-101 TECHNOLOGY ECOSYSTEM SCORECARD | WRA-102 AI Sales Readiness Checklist | WRA-103 Customer Reactivation Worksheet

EXECUTIVE INSIGHT

Retailers rarely lose sales because they lack software. They lose sales because customer data, sales processes, follow-up, reporting, and AI aren't working together. This assessment helps identify where revenue is leaking — and where the fastest improvements can be made.

Estimated completion time: 10 minutes

THE WOLFE RETAIL GROWTH FRAMEWORK™

MEASURE → ANALYZE → PRIORITIZE → IMPLEMENT → OPTIMIZE

RECOMMENDED PARTICIPANTS

- | | | | |
|---|-------------------------------------|------------------------------|--|
| <input type="checkbox"/> Owner | <input type="checkbox"/> President | <input type="checkbox"/> COO | <input type="checkbox"/> Sales Manager |
| <input type="checkbox"/> Marketing Director | <input type="checkbox"/> Operations | <input type="checkbox"/> IT | <input type="checkbox"/> Store Manager |

How to use this scorecard: Score each area from 1 (unclear or disconnected) to 5 (reliable, visible, and managed). Be honest rather than aspirational — this tool is only useful if the score reflects reality today.

COMPANY / STORE

COMPLETED BY

DATE

1. POS AND CUSTOMER DATA

SCORE ____ / 5

- Customer records are clean and searchable.
- Quotes, sales, service, and delivery status can be connected to the customer.
- Duplicate customer records are actively managed.

NOTES / EVIDENCE

2. CRM AND FOLLOW-UP

SCORE ____ / 5

- Leads are routed quickly and visibly.
- Follow-up is consistent by store and associate.
- CRM activity can be connected back to sales outcomes.

NOTES / EVIDENCE

3. TRAFFIC AND CONVERSION

SCORE ____ / 5

- Showroom traffic is measured consistently.
- Conversion and Revenue Per Opportunity are reviewed with context.
- Traffic, CRM, and POS data can be reconciled.

NOTES / EVIDENCE

4. DIGITAL VISIBILITY AND REPUTATION

SCORE ____ / 5

- Google Business Profile information is accurate.
- Google Reviews, Yelp, and other reputation signals are monitored.
- Website and campaign activity can be tied to meaningful retail outcomes.

NOTES / EVIDENCE

5. REPORTING AND EXECUTIVE DECISIONS

SCORE ____ / 5

- Leadership has one credible view of performance.
- Dashboards explain what happened and what to do next.
- Reports do not require manual spreadsheet reconciliation every week.

NOTES / EVIDENCE

6. AI READINESS

SCORE ____ / 5

- Employees know what information should not be entered into AI tools.
- AI use cases are connected to real workflows.
- Human verification and accountability are clear.

NOTES / EVIDENCE

TOTAL SCORE

____ / 30

WRA Maturity Index™

LEVEL 1 6–14 pts	Emerging	High friction. Start with data quality, ownership, and process clarity before buying more software.
LEVEL 2 15–20 pts	Developing	Meaningful opportunity. Prioritize the gaps affecting revenue, trust, and execution.
LEVEL 3 21–26 pts	Mature	Strong foundation. Focus on optimization and governance.
LEVEL 4 27–30 pts	Industry Leader — Operational Excellence	Best-in-class execution. Focus on scaling advantage and mentoring the organization.

INDUSTRY BENCHMARK

Most retailers score between 16–22 on the Technology Ecosystem Scorecard. Organizations scoring 25+ typically have stronger data visibility, more consistent follow-up, and better executive reporting.



WOLFE

RETAIL ADVISORS

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Executive Summary & Action Plan

Translate your scores into a plan leadership can act on.

Overall summary (2–3 sentences):

Top Three Strengths

1.

2.

3.

Top Three Risks

1.

2.

3.

Quick Wins (Next 30 Days)

Action	Owner	Target Date

Long-Term Projects (90+ Days)

Initiative	Owner	Target Quarter

WRA Executive Score

ASSESSMENT SCORE

Your Organization Currently Fits Here

Emerging Developing Mature Industry Leader

What Happens Next?

Once you've completed this Technology Ecosystem Scorecard, here's what to expect:

1. Email your completed assessment.
2. We'll review it before your call.
3. Receive a customized executive scorecard.
4. Meet for a 30-minute strategy session.
5. Receive a practical 90-day action plan.

No software sales. No vendor commissions. Just practical advice.

Email your results: sales@wolfeintegrationsystems.com

Book your free call: wolfeintegrationsystems.com/#strategy-call



Schedule Your Executive
Strategy Review
Scan Here

Meet Your Advisor

Dr. Todd Wolfe

Founder & Principal Advisor

Helping Home Furnishings Retailers Turn Technology Into Revenue

Independent advice. Practical roadmaps. Measurable business outcomes.

Dr. Wolfe brings 25+ years leading enterprise technology, AI, data, and software engineering, including 15+ years advising home furnishings retailers on turning technology into revenue. He is an independent advisor with no software commissions and no vendor bias.

Learn more: wolfeintegrationsystems.com