



Supply Chain Disruption Case Management Checklist Template 2026

Initial Disruption Identification & Alerting

Steps for detecting, verifying, and categorizing the scope of the supply chain anomaly or failure.

Date of Disruption Detection

Disruption Source/Origin

Disruption Severity Level

- ☐ Low - Minimal impact on delivery timelines
- ☐ Medium - Potential delay to key components
- ☐ High - Immediate halt to production or distribution
- ☐ Critical - Complete supply chain failure

Affected Supply Chain Nodes

- ☐ Raw Material Suppliers
- ☐ Manufacturing Facilities
- ☐ Logistics/Freight Carriers
- ☐ Distribution Centers
- ☐ Third-Party Logistics (3PL)

Initial Incident Description

Write something...

Supporting Evidence (News reports, photos, or sensor alerts)

 Upload File

Impact Assessment & Criticality Analysis

Evaluating the severity of the disruption on Tier 1, 2, and 3 suppliers, key product lines, and customer commitments.

Disruption Severity Level

- ☐ Low (Minor delay, no impact on end customer)
- ☐ Medium (Potential delay, localized impact)
- ☐ High (Significant delay, critical component shortage)
- ☐ Critical (Complete stoppage, production shutdown risk)

Affected Supply Chain Nodes

- ☐ Raw Materials
- ☐ Tier 1 Suppliers
- ☐ Logistics/Freight
- ☐ Warehousing/Distribution
- ☐ Finished Goods

Affected Product SKUs

Write something...

Detailed Impact Description

Write something...

Estimated Date of Resolution

Enter date...

Estimated Financial Loss (USD)

Enter a number...

Supporting Evidence/Incident Reports

 Upload File

Stakeholder Communication Protocol

Internal and external notification workflows for procurement, logistics, sales, and upper management.

Incident Notification Date

Enter date...

Disruption Severity Level

- ☐ Low - Minor delay, no immediate action required
- ☐ Medium - Potential impact on upcoming shipments
- ☐ High - Critical stoppage, immediate intervention required
- ☐ Critical - Total supply chain failure/Force Majeure

Internal Departments Notified

- ☐ Procurement
- ☐ Logistics/Operations
- ☐ Finance
- ☐ Sales/Customer Success
- ☐ Executive Leadership

Summary of Communication Sent

Write something...

Official Incident Advisory Document

 Upload File

Incident Commander Acknowledgment

Alternative Sourcing & Logistics Redirection

Execution of contingency plans, including activating backup vendors and rerouting transit lanes.

Primary Redirection Strategy

- ☐ Activate Secondary Supplier
- ☐ Reroute Existing Shipment
- ☐ Switch to Air Freight
- ☐ Hold Shipment in Transit

New/Alternative Supplier Name

Expected Re-routing Completion Date

Affected Logistics Nodes

- ☐ Port/Terminal
- ☐ Warehouse/Distribution Center
- ☐ Border Crossing
- ☐ In-Transit Hub

Updated Shipping Manifest or Routing Order

 **Upload File**

Logistics Disruption Details & Rerouting Rationale

Write something...

Inventory & Buffer Stock Management

Instructions for auditing existing safety stock levels and managing immediate depletion rates.

Affected SKU/Product ID

Write something...

Current On-Hand Quantity

Enter a number...

Minimum Safety Stock Level

Enter a number...

Stock Depletion Status

- ☐ Stable
- ☐ At Risk
- ☐ Critical/Stockout Imminent
- ☐ Stockout Occurred

Estimated Stock Depletion Date

Enter date...

Inventory Audit Report

 Upload File

Financial & Contractual Review

Assessing force majeure clauses, assessing cost implications of expedited shipping, and reviewing vendor penalties.

Contractual Clause Triggered

- ☐ Force Majeure
- ☐ Service Level Agreement (SLA) Breach
- ☐ Delivery Delay Penalty
- ☐ Price Escalation Clause
- ☐ No specific clause triggered

Estimated Financial Impact (USD)

Enter a number...

Contract Review Completion Date

Enter date...

Legal & Financial Risk Summary

Write something...

Supporting Legal Documentation

 Upload File

Finance Controller Approval

Mitigation & Recovery Execution

Active monitoring of recovery actions and implementation of long-term stabilization measures.

Mitigation Start Date

Enter date...

Mitigation Strategy Implemented

- ☐ Supplier Diversification
- ☐ Inventory Reallocation
- ☐ Route Optimization
- ☐ Product Substitution

Description of Recovery Actions Taken

Write something...

Affected Logistics Nodes

- ☐ Warehousing
- ☐ Sea Freight
- ☐ Air Freight
- ☐ Last-Mile Delivery
- ☐ Inbound Manufacturing

Evidence of Resolution (e.g., New Manifests or Invoices)

 Upload File

Supply Chain Manager Approval

Post-Disruption Post-Mortem & Process Improvement

Documentation of lessons learned to update the 2026 Risk Management Plan and strengthen supply chain resilience.

Post-Mortem Review Completion Date

Enter date...

Root Cause Analysis Summary

Write something...

Primary Disruption Drivers

- ☐ Logistics/Transit Delay
- ☐ Supplier Insolvency
- ☐ Raw Material Shortage
- ☐ Geopolitical Event
- ☐ Natural Disaster
- ☐ Labor Strike/Shortage

Total Estimated Financial Impact (USD)

Enter a number...

Recommended Preventive Actions

Write something...

Incident Documentation & Evidence

 Upload File

Supply Chain Director Approval

< Previous

> Next

✓ Finish

 Generate Sample Report