

# Your Ultimate Guide to Selecting the Perfect WMS

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## INTRODUCTION

# Navigate WMS Selection with Confidence

## Welcome!

This guide is your essential companion for confidently choosing or upgrading a Warehouse Management System (WMS) and making informed decisions tailored to your business objectives.

To sidestep common pitfalls and seize opportunities for success, keep reading.



# Understanding Pain Points

If you're grappling with inventory discrepancies, frequent order errors, or rising operational costs, it's time for a change. Keep reading for signs that you might benefit from better warehousing solutions.



## Inaccurate Inventory Management

If you often need to correct inventory counts or find mistakes in counting, it's time to look for more **accurate solutions**.

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## High Order Error Rates

If order mistakes are leading to dissatisfied customers and decreased sales, it's time to look for more **reliable solutions**.

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## Rising Operational Costs

If your warehouse expenses are increasing and your earnings remain the same or decrease despite increased work, it's time to look for more **affordable solutions**.

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## Scaling Challenges

If your WMS can't handle more orders, bigger inventory, or multiple locations — and you can't grow as a result — it's time to look for more **powerful solutions**.

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## Lack of Insightful Data

If you don't have enough information about how your warehouse works to make smart decisions, it's time to look for more **intelligent solutions**.

# Essential Considerations and Features

An outstanding WMS should have key features like real-time inventory tracking, automation, and integration with other systems. These features help you fill orders accurately, smooth your processes, and ensure your systems work well together. Focus on features that solve your specific business problems and help you reach your goals.

## Identify Current Pain Points



### Assess Operations

- Analyze areas where errors frequently occur or where manual tasks could be automated.
- Consider feedback from staff regarding pain points in daily operations.



### Define Pain Points

- Document specific challenges or pain points encountered in warehouse management.
- Quantify the frequency or severity of each pain point to inform decision-making.



### Set Clear Goals

- Define specific, measurable goals for your warehouse operations, such as increasing efficiency, reducing costs, or enhancing customer service.
- Ensure goals are realistic and achievable within a reasonable timeframe.



Check out the infographic on **page 11** for further help on this evaluation process. These steps will help you understand your warehouse operations clearly, identify areas needing improvement, and set goals to guide you in selecting a WMS.

# Steps for Smooth Implementation

Think strategically to ensure a successful WMS implementation. Check the vendor's reputation and the total cost of ownership. These factors can greatly influence how smoothly your WMS adoption journey goes.

## 1. Easy Buy-in

- Does the vendor have a strong reputation for reliability and trustworthiness?
- Can you request a demo to experience the WMS firsthand and evaluate its features and functionalities against your requirements?
- Will the data migration process be seamless?

**Why it Matters:** Before implementing the WMS, it is important to establish trust with the vendor and validate the system's suitability to ensure a smooth process.

## 3. Future-ready Approach

- Do they have the flexibility and scalability to accommodate future business growth, technological advancements, and industry shifts?

**Why it Matters:** Embracing adaptability ensures that your business is not left behind by changing technologies and is well-positioned to take advantage of new opportunities.

## 2. Support and Self-service

- Do they provide comprehensive training and self-service resources to equip your team with the necessary skills for WMS adoption?
- Do they engage with user communities to leverage collective expertise, share insights, and troubleshoot issues collaboratively?

**Why it Matters:** Investing in team empowerment promotes internal expertise and ensures ongoing support through knowledgeable peers.

## 4. Total Cost of Ownership (TCO)

- Do you know what contributes to TCO reduction, like efficient configuration, seamless integration, and optimization features?
- Do you understand cost structure, pricing models and potential additional fees so you can make informed financial decisions?

**Why it Matters:** Prioritizing TCO considerations helps with budgeting, reduces unexpected costs, and maximizes WMS value.

# Questions to Ask Your Sales Rep Before You Demo

Before scheduling a demo, ask your sales representative these questions to ensure their system meets your needs:

## 1. Functionality

- What are the core features of the WMS?
- Can it handle multiple warehouse locations and support batch-picking?

## 3. Scalability

- Can the WMS scale to accommodate business growth?
- Are there additional costs associated with scaling the system?

## 5. Customization

- To what extent can the WMS be customized to meet our specific business needs?
- Are there any limitations or additional costs associated with customization?

## 7. Order Management

- How does the WMS handle order processing, fulfillment, and tracking?
- Can it manage various order types like B2B, B2C, and wholesale?

## 9. Reporting and Analytics

- Are reporting and analytics tools available?
- Can custom reports be generated based on specific business requirements?

## 2. Integration

- How easy is it to integrate with other business systems?
- Is it compatible with our existing hardware and software infrastructure?

## 4. Mobile Access

- Does the WMS support mobile devices and provide real-time updates?
- Can warehouse tasks be managed via mobile apps?

## 6. Automation

- Does the WMS support automation features like automated picking and packing?
- Can it integrate with robotics or other automated systems?

## 8. Inventory Control

- What features does the WMS offer for real-time inventory tracking and control?
- Does it provide cycle counting and inventory optimization tools?

## 10. Upgrades and Maintenance

- How are software updates and upgrades handled?
- Is there a regular maintenance schedule, and how is downtime managed?

# Questions to Ask Yourself Before You Demo

To help you select the appropriate WMS, evaluate your operational requirements by asking yourself the following questions:

## 1. Current Operations

What are our existing warehouse processes, and are they as efficient as possible?

## 3. Business Growth Objectives

What are our long-term business growth objectives, and how can a WMS help achieve them?

## 5. Integration with Existing Systems

What other systems do we use, and how important is it that they work well with our new WMS?

## 7. Resource Allocation

How much time and resources can we dedicate to training our team on a new WMS?

## 9. Customization Requirements

Do we have specific business processes requiring a highly customizable WMS?

## 2. Operational Challenges

What specific challenges or pain points does our current warehouse management face?

## 4. Scalability Needs

How much can our warehouse management solution grow if our business expands?

## 6. User Needs

Who will be using the WMS, and what features do they need for it to work best?

## 8. Financial Considerations

What is our budget for implementing a WMS, and are there any extra costs we need to know about?

## 10. Data Security Priorities

How important is keeping our business data secure, and what security measures should our chosen WMS provide?



## CONCLUSION

# Buy With Confidence

As you read this buyer's guide, you'll find everything you need to pick the best warehouse management system for your business. Each section is carefully assembled to give you the confidence to make decisions. This guide covers everything from spotting the signs that you need a new WMS to strategic factors, essential features, and smart questions you should ask yourself and your sales representative.

Let this guide empower you to make informed choices that will drive your business toward success and help you navigate the world of warehouse management systems confidently.

**Infographics Included:**

- How to Identify & Buy with the Best WMS for Your Business
- Key Elements to Look for When Evaluating WMSs
- Checklist of Key Features to Identify

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# How to Identify & Buy with the Best WMS for Your Business

## Assess Current Operations and Pain Points:

### Warehouse Woes



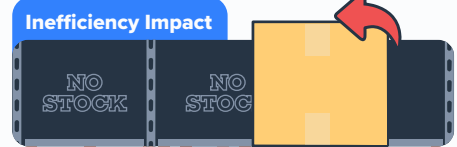
**Example:** Slow order processing due to manual picking processes.

### Targeted Pain Points



**Example:** Difficulty in tracking inventory across multiple locations.

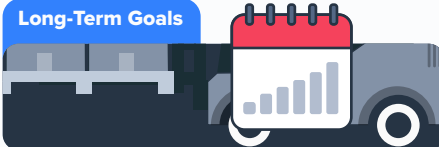
### Inefficiency Impact



**Example:** Inventory discrepancies occur on a weekly basis, leading to stockouts and backorders.

## Set Clear Goals Aligned with Business Objectives:

### Long-Term Goals



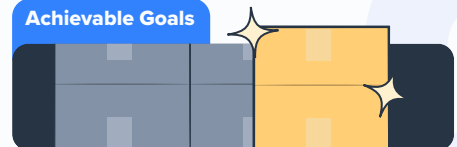
**Example:** Increase order fulfillment speed by 20% within the next year.

### WMS Solutions



**Example:** Implementing automated picking processes to improve efficiency.

### Achievable Goals



**Example:** Reduce order processing errors by 50% within six months.

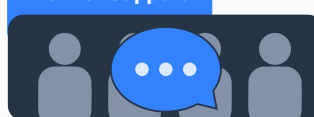
## Strategic Considerations:

### Vendor Reputation



**Example:** Positive customer reviews and industry awards for reliability.

### Vendor Support



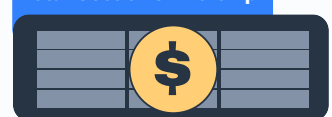
**Example:** Comprehensive onboarding program and ongoing customer support.

### WMS Flexibility



**Example:** Ability to add new warehouse locations or integrate additional systems.

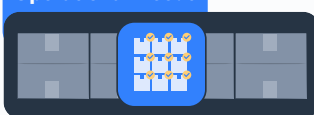
### Total Cost of Ownership



**Example:** Initial implementation costs, ongoing subscription fees, and potential customization expenses.

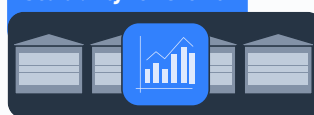
## Considerations Before Demoing:

### Operational Needs



**Example:** Need for real-time inventory tracking to prevent stockouts.

### Scalability for Growth



**Example:** Anticipated increase in order volume due to business expansion.

### System Integration



**Example:** Requirement for seamless integration with current ERP software.

### Customization Requirements



**Example:** Specific workflows or reporting formats unique to the business.

# Key Elements to Look for When Evaluating WMS

## Functionality

**Assess core features, integration capabilities, and scalability to meet current and future needs.**

- ☐ Core features evaluated.
- ☐ Integration capabilities checked.
- ☐ Scalability assessed for future needs.

## Customization

**Evaluate the extent of customization options and any imitations that may impact your specific business requirements.**

- ☐ The extent of customization options explored.
- ☐ Limitations noted for consideration.

## Automation

**Explore support for automation features and integration with robotics or other automated systems.**

- ☐ Support for automation features examined.
- ☐ Integration with automated systems considered.

## Order Management

**Consider how the WMS handles order processing, fulfillment, and different order types.**

- ☐ Order processing capabilities reviewed.
- ☐ Fulfillment methods assessed.
- ☐ Handling of various order types evaluated.

## Inventory Control

**Review real-time tracking capabilities, inventory optimization tools, and cycle counting features.**

- ☐ Real-time tracking capabilities assessed.
- ☐ Inventory optimization tools explored.
- ☐ Cycle counting features considered.

## Reporting and Analytics

**Assess the availability of reporting and analytics tools and the ability to generate custom reports.**

- ☐ Availability of reporting and analytics tools checked.
- ☐ Ability to generate custom reports evaluated.

## Upgrades and Maintenance

**Understand how software updates, upgrades, and regular maintenance are handled to minimize downtime.**

- ☐ The procedure for software updates and upgrades is understood.
- ☐ Maintenance schedule reviewed.





# WMS Feature Checklist



## Real-Time Inventory Tracking

Does the WMS offer accurate and up-to-date inventory information to support efficient operations?



## Automation Features

Can the WMS streamline warehouse tasks through automation capabilities to increase productivity?



## Integration with Other Systems

Can the WMS seamlessly connect with existing ERP, CRM, and inventory management systems?



## Scalability for Business Growth

Does the WMS have the flexibility to grow alongside your business and adapt to changing needs?



## Mobile Access and Updates

Can warehouse information be accessed and real-time updates received on mobile devices for enhanced flexibility?



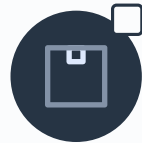
## Customization Options

Are there options to tailor the WMS to your unique business processes and requirements for optimal performance?



## Order Processing and Fulfillment:

Can the WMS efficiently manage and fulfill orders, including various order types, to meet customer demands?



## Inventory Optimization Tools

Does the WMS provide features to optimize inventory levels and reduce carrying costs?



## Reporting and Analytics Capabilities

Are robust reporting and analytics tools available to gain insights into warehouse performance?



## Upgrades and Maintenance Procedures

Does the WMS have regular software updates, upgrades, and maintenance procedures in place for smooth operation?

