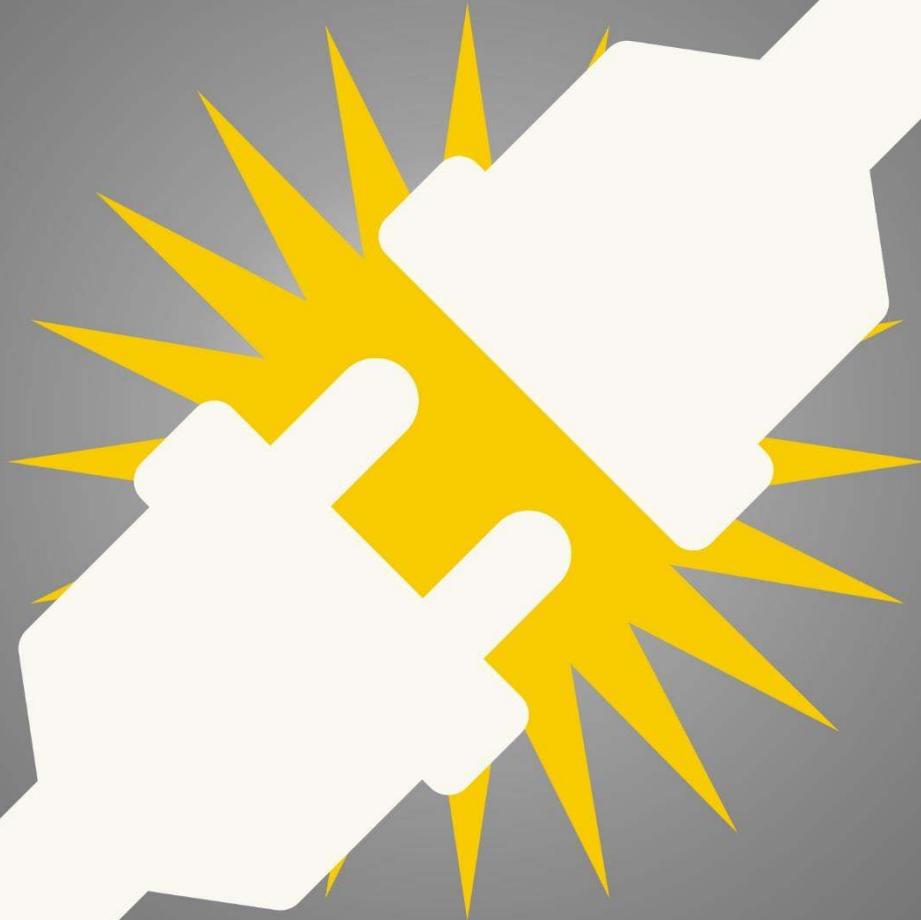


guide for a
SUCCESSFUL WMS IMPLEMENTATION



A Guide By

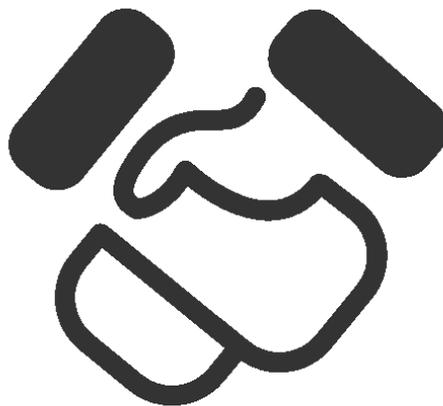


Written By Laura Olson

Guide for a Successful WMS Implementation

Tips to Get Ready for the WMS System Implementation Process

As your organization evaluates various warehouse management system options, it is time to start to begin planning for the software implementation process. Implementing a WMS software solution requires input and collaboration from both the software vendor and the client. As a client, you undoubtedly want to ensure that any warehousing software solution you select will provide the best results for your business. Not all businesses of the same type use the same operational processes and have the same needs. For this reason, it is key that you participate in the implementation process, provide the necessary information, decisions and access and collaborate on any customization with the software vendor.



Getting Started on Your WMS Software Implementation Project

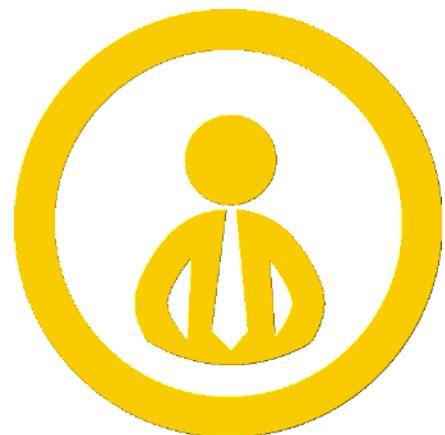
Establish your expectations. As you have searched for warehousing management software, you probably have defined your expectations for your WMS system project timeline and budget. In addition, you may have developed a greater understanding of the full range of technology solutions available for managing your supply chain operation. Now knowing the various components such as servers, mobile hardware solutions, printers and labels, EDI solutions, integrations, etc., you should work with the software vendor to clarify the timeline and budget involved with each of these components.

Are third parties delivering part(s) of your technology solution? For example, if the WMS software vendor is not providing all these technology components, it is likely that multiple vendors will be required to participate in the implementation process. If so, you should understand that working with multiple vendors may add complexity, time and cost to your project.

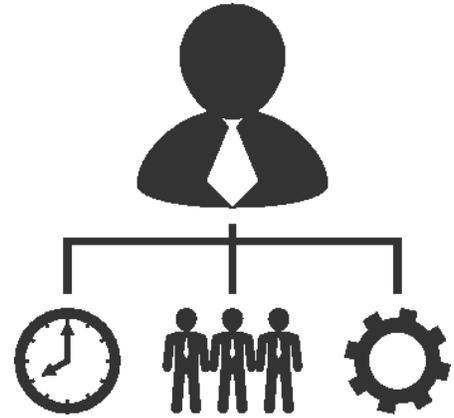
Understand that both the software vendor and the client have responsibilities during the warehouse management software implementation process. Each will have deliverables and the project timeline is based upon each party meeting the established delivery dates. Similarly, if communication is not clear and seamless or if decisions are not provided in a timely manner, this can also have an effect on the project timeline and budget.

Understand the role of the software vendor.

Before making a final decision on a warehouse management system and vendor, discuss the implementation process with each software vendor. Address any questions or concerns you may have regarding the implementation process, resources and methodology. While WMS system vendors are experts in their respective software solutions, a software vendor will need you to teach their representatives about your specific operation and processes.



Know your business. Make sure that your team has a clear understanding of the operational needs and processes of your supply chain business. The team must be able to communicate this information consistently to the software vendor's project implementation team. This includes knowing about your customer's needs, expectations and processes as well. It is also critical to know and be able to communicate information to the software vendor regarding any challenges you want to resolve. Here are some other ways you can help to ensure that the software vendor has mission critical information about your operation:



- Identify problem areas, business challenges and weaknesses in your operation-look for opportunities to improve current operational processes
- Be able to articulate operational processes so that the software vendor can make comparisons with industry best practices
- Clarify issues and processes related to key customer accounts including inventory type, busy seasons, etc.
- Identify interfaces needed with shipping carriers, enterprise systems such as TMS, ERPs, material handling solutions, scales, etc.
- Provide a list of all mobile hardware solutions, RFID, printers and peripherals and other technology solutions to make sure that all technology is compatible with the respective warehouse management system
- Clarify if third party solutions will be needed, such as labels, middleware for RFID, etc.

Embrace a culture of change in your organization. Change can be hard for many people. Often team members can become fearful, anxious and unwilling to learn new technology or operational processes. By communicating with your workforce about the changes that are planned, the anticipated outcome and the many benefits that new warehouse management system technology can bring to your

business and to their daily life, you can help to encourage greater adoption of the new technology and ease anxiety. Involving team members from each department for feedback and assistance can also provide encouragement. This will help to reassure your workforce that all voices will be heard and that the work effort from each department is valuable and needed.

Be ready to commit resources. As part of the WMS solutions evaluation process, you may have involved team members from across your operation. If you have done so, you have taken the first step towards facilitating the successful implementation of a warehouse software solution.

First identify someone to act as your internal Project Manager. This person can be an employee or if necessary, an outside resource contracted for the WMS implementation project. Your company's Project Manager needs to have knowledge of your operation, the trust of executives, solid communication and organization skills and be a strong team player. Having an internal Project Manager who knows and understands your business and the key players in your organization is critical to a successful WMS project implementation.

Why is an internal Project Manager needed?

- To act as a single point of contact with the software vendor so that all communication is seamless
- To represent the interest of your organization
- To provide guidance to the software vendor about operational processes, business needs and requirements, etc.
- To ensure that all access, information, data, and deliverables are provided in a timely manner to the software vendor
- To review recommendations, documentation and deliverables from the software vendor and relay critical issues to the WMS project sponsors and executives as needed



- To ensure that all deliverables required by your organization are provided in a timely manner
- To help allocate and oversee resources if necessary, such as of cross-functional team members or for training of your workforce
- To participate in meetings such as project status updates

Clarify communication protocols. Having a methodology for communicating is important. Before you get too involved in the software implementation process, think about your organization's need for information about the process. Will you need weekly reports, just basic high level information or detailed communications? Who will need the information and what needs to be included to meet their needs? When will reporting need to be provided?

Although software vendors are experienced in dealing with implementation projects, a vendor typically will collaborate with you on setting up meeting schedules, messaging requirements, reporting formats and deadlines, etc. to make sure that your organization's needs are met.



Start with accurate inventory. Make sure you start the implementation process with the most accurate inventory information possible. Starting the implementation process of a warehouse management solution with inaccurate inventory information can have an impact on your project that multiplies, causes exceptions and results in financial concerns, labor inefficiency and other challenges.

Discuss implementation approaches with the software vendor. Warehouse management software solutions can be implemented across multiple facilities in numerous ways. Be sure that you have a detailed discussion about various implementation approaches and consider your company's resources before proceeding. Does the software vendor recommend implementing the warehouse management system by facility, process or all at once in all facilities? How will this impact your operations, customers and staff?

Find out if the software vendor provides any tools for the implementation process.

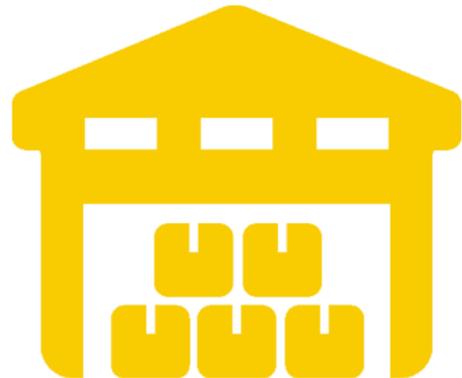
Here are some questions to ask the software vendor regarding tools and resources for the implementation process and software product:

- Does the software vendor provide any type of project management system, portal with access to information regarding the WMS implementation process or other resource?
- Is there a knowledgebase of information available about the product?
- Are there online learning tools or a learning system to help speed up the training process?

Getting Your Organization Ready for a WMS Implementation

Get your facilities ready. Working on the preparation of your facilities now will help to have a positive impact on the implementation and can help reduce stress, frustration and anxiety of the workforce. Here are some areas that may need attention in order to be ready for the implementation process:

- Labeling
- Rack configuration
- Re-warehousing product
- Identify staging areas
- Install workstations
- RF site survey
- Dock preparation
- Know dimensional information
- Mobile hardware solutions: Do they work with the warehouse management system selected? Are all devices currently in working order? Are any accessories or peripherals needed?



- Internet connectivity-If you are purchasing a SaaS or cloud solution, make sure that your organization validates system uptime and resolves any connectivity issues before implementing a warehouse management software solution.

Select Your Project Manager

Here are some of the skills that are necessary for an effective Project Manager for the WMS software implementation process:

- Understanding of your operation, organizational structure and customers
- Trust and support of executives and project sponsors
- Ability to navigate successfully between multiple departments
- Excellent communication, organization and follow up skills
- Leadership skills and the ability to inspire confidence in others
- Ability to work independently as well as part of a team
- Ability to participate in all implementation project meetings held by software vendor. Must be able to convey results, decisions, questions and requests to the project sponsors and company executives as well as to the software vendor
- Should have some familiarity with IT issues, terminology, technology components, etc. if possible



Assemble a cross functional team to aid in the WMS implementation process

Select team members from each department including:

- Warehouse/operations
- Sales
- IT
- Customer service
- Finance
- QA/QC
- Manufacturing

Involve managers/supervisors for each functional area.

Before starting the project, communicate to the team that the implementation of a warehouse management system requires, time, teamwork and commitment. Establish communication and clarify what will be expected of each team member. Each team member's input into the operational processes of each department will be invaluable to the success of the project. The team can help to motivate the workforce to accept and adopt the new WMS technology and can help alleviate anxiety related to system and process change.



Conclusion

Before finalizing your decision to purchase a warehouse management system, your organization can take steps to get ready for the implementation process. Here are some tasks on which your organization can begin to work now to help to ensure a successful WMS implementation. Select a project implementation team and internal Project Manager to represent your organization:

- Establish clear expectations for the implementation project
- Understand the role of the software vendor and the client in the implementation process
- Know your business and be able to communicate detailed information about operational processes clearly
- Start to prepare your facilities
- Encourage a culture of change in your organization to help ease the anxiety and stress of navigating to new technology

Taking the time and effort to get ready now before the implementation process starts can help to provide better results for your organization.

About Datex

Datex provides flexible, reliable supply chain technology solutions to help make businesses more profitable, including supply chain software, mobility solutions, professional services and mobile device management. In business for over 35 years, Datex has a wealth of experience in helping companies across the world meet these critical business challenges.

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