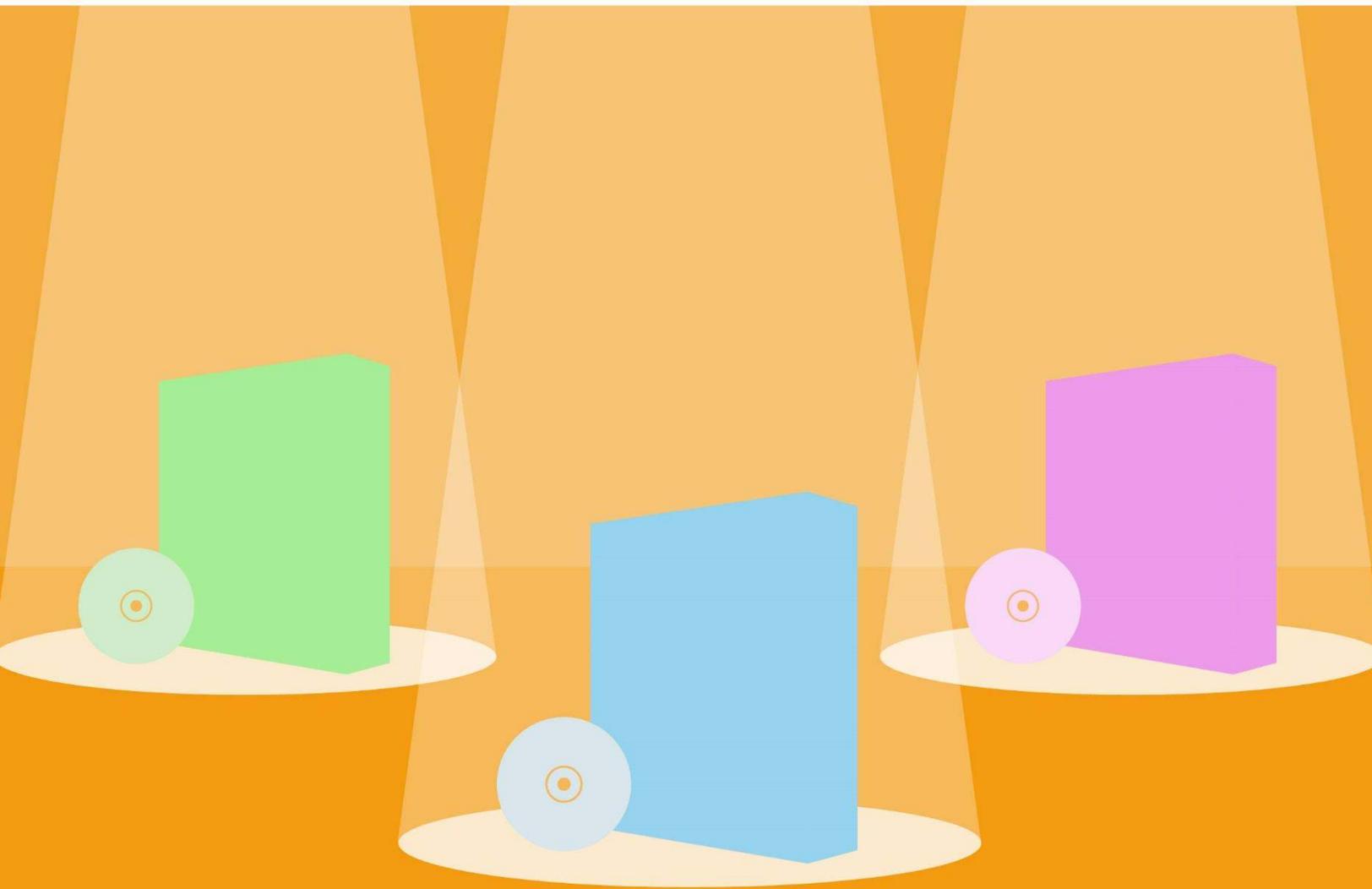


# HOW TO GET THE MOST OUT OF A **WMS SOFTWARE EVALUATION PROCESS**



# How to Get the Most out of a WMS Software Evaluation Process

Looking for new warehouse management software? Before you schedule any software demonstrations, get prepared. Getting ready for the software evaluation process can help to ensure that you have a full understanding of your business needs as well as the information assembled to provide to software vendors. This effort can help to streamline the selection process for a WMS system and enable you to have a clearer perspective on the features and functionality that are “must haves” versus those that it would be “nice to have” in the WMS software package.

While there are a large number of warehouse management system software packages on the market today, most have the ability to conduct processes like picking, putaway, outbound, etc. One of the main differences in warehouse management systems tends to be in how these processes are done within the software. For this reason, it is critical that you and your team are able to see WMS solutions working in real time and not simply screenshots in a presentation.

## **How to Get Ready for the WMS Software Evaluation Process**

Whether your WMS software project is initiated by the operations or IT team, it is important that there is a clear understanding of your company’s operational processes in the facilities for which the warehouse management system will be used. If your business is a third party logistics provider, it is necessary for you to also have knowledge of processes that may be specific to one or more of your customers.

## **Document or map out key operational processes**

Ideally it is advisable for you to take some time to write down or map out key processes used in your operation. This will make it easier to convey the details to WMS software vendors and help them to be able to provide the type of customized sales presentations and software demonstrations that will benefit your business.

## **Compare your operational processes with industry best practices**

As you learn more in depth information and document operational processes, it is advisable for you to compare this information with industry best practices. As you gather information, talk to team members in each area to find out their daily challenges and learn if any processes need to be altered to increase efficiency or productivity. Encouraging free dialogue about the current WMS software your business is using.

Make sure you make note of operational processes that are ineffective, include manual work, are error prone and are time or labor intensive. These types of processes can often be improved with some alteration and use of a warehouse management system, especially a system that utilizes workflows or is workflow based.

## **Identify what you like and do not like about your current WMS software**

Keep track of features found in your current WMS software solution that you and your team do not like or do not find effective. Knowing the limitations and challenges of your current warehouse management software can help you to focus your attention on finding the right solution for your business.

## **Identify your technical requirements and limitations.**

Be ready to discuss your current use of mobile hardware solutions, printers, servers, wireless network, etc. Review your current hardware and systems so that you can provide WMS system vendors with information on what you are currently using and will need.

Knowing how many software users you will need for both desktop and mobile users is typically necessary for WMS software vendors to produce quotes.

Understand the limitations of the size, scope and experience of your technology team. Be ready to ask WMS vendors questions about the expertise needed to customize reports, labels, billing, contracts and other documentation, perform software upgrades and other issues. You may find it useful to pay special attention to vendors that can provide not only warehousing software but also mobile hardware solutions, mobile printers and services such as mobile device management, hosting and more. Developing a partnership with one vendor to provide warehousing software, mobile hardware solutions as well as services including integrations and EDI solutions often can help reduce implementation time, errors and cost.



Discuss internally if you have a preference for a specific software delivery model - on premise, Cloud vs. SaaS. As part of your software evaluation process, you may want to consider various delivery models. Not all WMS software vendors offer all delivery models, so keep this in mind when determining which vendors to contact.

To develop a common understanding of the size, scope and timeline of your project be sure to provide software vendors with information on integrations and EDI solutions. This will also help software vendors to estimate costs for your project. Know the integrations that will be needed for your project. If you will be utilizing EDI solutions as part of your warehouse management system project, know the document numbers, number of trading partners and other essential information.

## Getting the Most from the WMS Software Demonstration Process

Once you and your team have reviewed operational processes, technical requirements and other mission critical business information, you are ready to start looking at warehouse management software demonstrations.



### How to get prepared for a warehouse management software demonstration

Before scheduling a warehouse management system software demonstration, some software vendors may want to schedule a discovery call to learn more about your project. The vendor may ask you questions about such issues as:

- Project timeline
- Number of users
- Number of warehouses
- Types of features and functionality needed
- Types of inventory you handle
- Integrations
- Whether EDI solutions will be needed
- Delivery model
- Questions about the technical needs and requirements of your WMS project

It is useful to discuss if your business is using RF, RFID or other technologies as well as your use of mobile hardware solutions and to clarify if your business operates under any regulatory restrictions such as FDA 21 CFR Part 11, DQSA,

LBMA Good Delivery Rules, software validation or other standards based on the inventory you handle.

## **Develop a strategy for engaging and soliciting feedback from your team members**

Assemble a cross functional team of experts from each department. Ask them to participate in the selection of the warehouse management software by attending software demonstrations, providing information on the needs and processes of their department as well as feedback on each warehouse management system. Each department representative will undoubtedly have their respective concerns. From omni channel retailing and order management to shipping software and financial reports, your team can provide guidance on the issues that are most critical for your operation without having to rely on only one person as an expert on your business. This is especially important if you are evaluating a full suite of supply chain management software.

## **Develop a checklist of the features and functionality you want to see**

After you have compiled information about your business and considered your company's technical needs, it is key to have a list of both the business challenges you want the WMS software to help resolve as well as a checklist of the features and functionality you want to see.

Take notes, stay organized and keep information on each warehouse management system and vendor separate and clearly marked to avoid any confusion.

## **Develop a strategy for the software demonstration process**

Just as there is no "one size fits all" approach to evaluating WMS software, there is more than one strategy that can be employed with the software demonstration process. While often unspoken, one of the primary concerns of companies that evaluate software systems is the need to become comfortable with the software. As a potential software buyer, you need to be sure



that the software is not only a good fit for your business but also that the software vendor will engage with your team to resolve business challenges as needed, answer questions and be a true partner to your business.

If your business is evaluating a large number of warehouse management systems, it is especially useful to strategize and communicate your expectations for the software demonstration process. Engaging and comparing multiple systems can become confusing, especially if demonstrations are scheduled within a short period of time. Often participants cannot recall or confuse details about systems and this can lead to poor decision making.

Before scheduling your initial WMS system software demonstration, determine if you want to see just a system overview at first or a more detailed look at the software. Knowing this will help the WMS software vendor schedule your demonstration.

Here are some tips to help ensure that your company can increase the effectiveness of the WMS software demonstrations it receives from each software vendor:

- Prepare an agenda of features and functionality that you need to see
- Ask for separate demonstrations of each functional area: operations, IT, customer service, finance, managerial/executive etc.
- If your business manages specialized or regulated inventory, you may want to set aside time to see specific features and functionality of each WMS system to show how the software can meet those business needs and requirements
- It can be very useful to schedule shorter meetings (15-30 minutes) to focus on area specific topics. This will allow you to engage only those team members who would be most affected. By scheduling these shorter software demonstrations, the attention of your team may be more focused on those specific issues without having to sit through a demonstration of other functionality they would not ordinarily use or in which they had no interest. This will also benefit you as it will allow you to take these team members away from their daily work for a shorter period of time. Here are

a few issues for which you may want to request separate WMS software topical demonstrations: omni channel retailing, order management, labor management, yard management, order fulfillment and shipping.

- Ask for the software demonstrations to be recorded and access provided to you for later review
- Ask questions and take notes. Make sure that any questions you ask are answered to your satisfaction and not deferred to be answered at a later date. Keep track of what you like, do not like and have concerns or questions about with respect to each warehouse management software solution and vendor.
- Immediately after the meeting, have a review session with your team members. Document the perceptions of the team thoroughly and make a list of any questions resulting from the demo
- Request a scripted demonstration. Provide data and scenarios that showcase how you would use the system. Include information on your company's operational processes. If a WMS system vendor will not provide a scripted demonstration, this should be a red flag. It is important for you to be able to see how the warehouse management software would work and be used by your company, not just in a generic demonstration. This may help to uncover gaps in functionality.

### **Schedule feedback sessions with the software vendors**

Provide lists of questions from your team as well as feedback on each warehouse management system. Engage the software vendor team to respond to your questions, meet with you as needed and note the time it takes to for them to respond as well as the quality of their response. This can provide valuable insight into how your business will be valued and treated by each software vendor in the future.



## Encourage software vendors to visit your facilities

Having a representative of the software vendor team visit your facilities can provide them with insight into your operations and better clarify your business needs and requirements. Not all visits are equal however. Pay attention to software vendors who send sales consultants versus seasoned business analysts and experienced supply chain experts to visit your company. A software vendor that sends only sales consultants is primarily interested in gathering information to make a sale. A software vendor that provides the added value of an experienced business analyst or supply chain expert is interested in forming a true collaborative partnership to ensure that their WMS solution is a good fit for your company and can resolve business challenges.

## Conclusion and some final advice

When evaluating warehouse management system software, it is best to invest time in preparation before engaging with each software vendor. Being prepared and armed with detailed information about your operation will enable you to guide each software vendor to show you the features and functionality required for your business and will ensure better information on which you can base your ultimate decision.

- Before beginning to engage in software vendor demonstrations, be prepared. Know your business, technical requirements and operational processes
- Identify which requirements are “must haves” as compared to “nice to have”
- Involve cross functional teams throughout the entire evaluation process
- Help facilitate the software demonstration process by determining a strategy before seeing the first demonstration

- Make sure you see a scripted demonstration using your data and scenarios that are common to your business
- Encourage software vendors to visit your facilities. Pay special attention to added value visits by experienced business analysts and supply chain experts as compared to those by sales consultants.

## 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.

Datex Corporation  
10320 49<sup>th</sup> Street North  
Clearwater, FL 33762  
[datexcorp.com](http://datexcorp.com)

For more information on Datex products and services, please contact us.

US Office – 1 800 933 2839  
Canada Office – 1 800 998 8980

