WMS IMPLEMENTATION
CHECKLIST

Over 100 steps to WMS implementation success

GUIDE HIGHLIGHTS
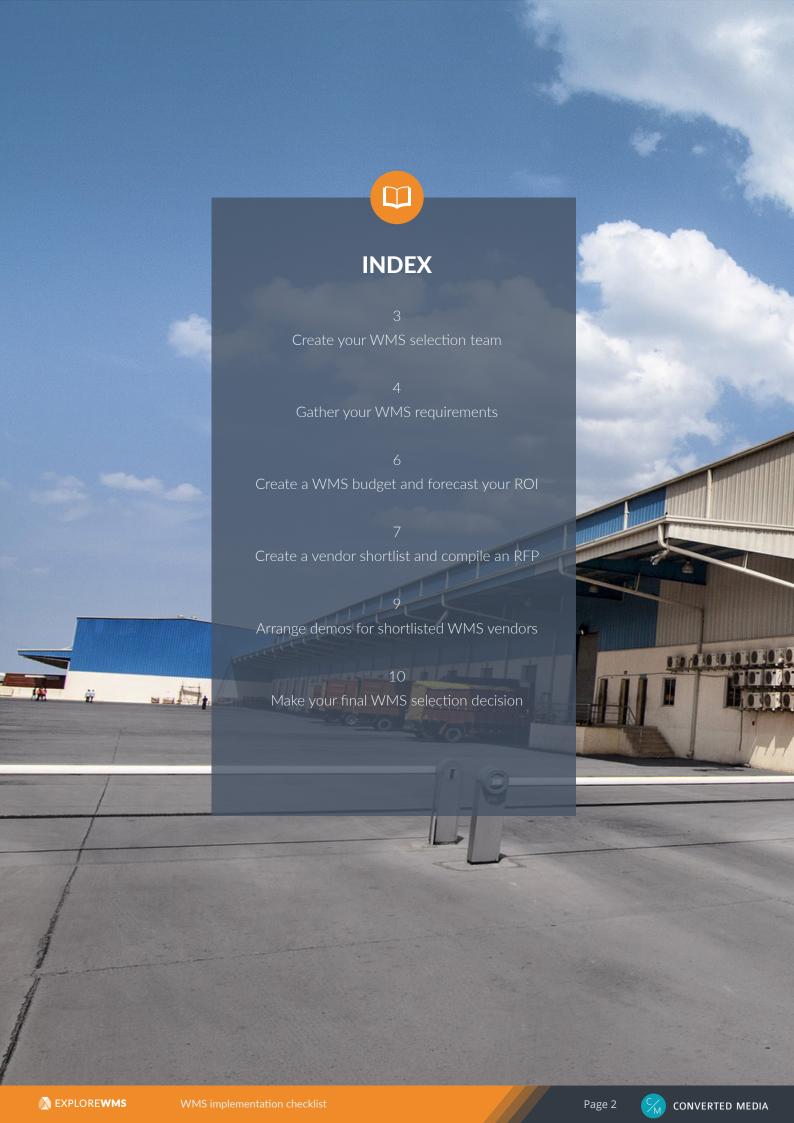
Creating a WMS change management plan

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RECRUIT YOUR WMS IMPLEMENTATION TEAM

Implementing a WMS is a significant undertaking, so it's vital to have a reliable set of people around you.

You'll need their input from the planning stage right through to evaluating the success of your project, so it makes sense to start the implementation process by recruiting a solid and reliable team that can help you take your project from the planning stages all the way through to go-live.

✅ **RECRUIT YOUR WMS IMPLEMENTATION TEAM**

◯ Map out implementation team requirements

　　◯ Managerial

　　◯ Technical

　　◯ User engagement

◯ Advertise for team members from across your organization

◯ Ask department managers for recommendations for suitable candidates

◯ Incentivize team membership with perks (for example extra day's holiday, free food at meetings, cash bonus on completion of implementation)

◯ Recruit your internal team members

◯ Decide whether you need a WMS consultant. If so:

　　◯ Decide which type of consultant (vendor or third-party)

　　◯ Get budgetary sign-off

　　◯ Shortlist suitable candidates and interview them

　　◯ Begin onboarding consultant

✅ **RECRUIT YOUR WMS IMPLEMENTATION TEAM**

◯ Managerial roles

　　◯ Project manager

　　◯ C-level sponsor

- ◯ Technical roles
    - ◯ Application analyst
    - ◯ Application developer
    - ◯ Application test engineer
- ◯ Consultancy roles
    - ◯ Third-party consultant OR
    - ◯ Vendor consultant
- ◯ User group representatives
    - ◯ Warehouse staff
    - ◯ Sales
    - ◯ Supply chain/logistics
    - ◯ Senior management

CREATE A CHANGE MANAGEMENT PLAN

For a while, your new WMS will be disruptive to your organization - large changes always are, particularly in a warehouse environment where following correct picking, packing and shipping processes is fundamental in keeping your operation running smoothly and ensuring goods get where they need to go.

How you manage this change will be fundamental to your project's success.

This is where you should map out a detailed implementation schedule, delegate responsibilities and agree on a set of KPIs by which to measure success. Without a solid plan, the implementation will dissolve into chaos, the wider workforce will resent you and senior management will start asking questions.

Talking of which, you'll need to communicate your schedule (and the potential disruptions it will cause) to your workforce clearly and openly; but make sure to emphasize the long-term benefits this move will have over the immediate inconveniences.

✔ CREATE A CHANGE MANAGEMENT PLAN

○ Clarify what implementation support your vendor is giving you and what you'll need to provide internally

- ○ Project management
- ○ Customization
- ○ Data migration
- ○ Consultancy
- ○ Training

○ Forecast implementation costs:

- ○ Implementation services
- ○ Consultancy
- ○ Staff overtime
- ○ Extra temporary warehouse and management staff
- ○ Data backup/storage

○ Create an overall implementation timeline

○ Create detailed timelines and plans for each of the following steps:

○ Agree on a set of KPIs by which to evaluate WMS implementation success

✓ CREATE A USER ENGAGEMENT PLAN

○ Anticipate which employee groups a WMS implementation will affect the most

○ Inform employee groups of anticipated disruption so they can plan ahead

○ Signpost ways in which employees can flag up concerns or questions about the implementation project

   ○ Noticeboard

   ○ Email

   ○ Newsletter

   ○ In meetings

○ Create a staff training timetable well in advance and ensure everyone is notified of their training slots

MIGRATE YOUR WMS DATA AND TRAIN YOUR USERS

As well as being an important step in allowing your employees to use your new WMS, the data migration phase is a great time to do some internal admin. There's no point transferring redundant data over as it will only clog up the system and increase risk of user error.

✔ MIGRATE YOUR WMS DATA

◯ Cleanse and verify your legacy WMS data

    ◯ Ensure customer contact details are correct

    ◯ Cleanse redundant internal data, e.g out-of-date employee info

    ◯ Cleanse redundant external data, e.g old supplier addresses and customer contacts

◯ Configure databases

◯ Map legacy data onto new database fields

◯ Transfer data to the new system

◯ Test and verify legacy data

◯ Test and verify new data inputs, for example:

    ◯ Inventory data (item location, stock)

    ◯ Supply chain data (shipping addresses, fleet vehicle information, driver records)

    ◯ Sales data (customer contact, history of orders)

✔ TRAIN YOUR WMS USERS

A well-planned training phase is essential in achieving sufficient user engagement to make your project worthwhile. If your employees don't know how to use your new WMS, they will develop workarounds that decrease the efficiency of the system and the potential productivity benefits of a new WMS will fail to materialize.

◯ Identify key WMS user groups that need training

◯ Decide which type of training suits your workforce best (e.g scheduled seminars for warehouse staff working on shifts)

◯ Identify and train handful of super user candidates across all relevant departments

○ Identify areas where super users could assist in training rest of workforce, for example:

  ○ Employee login and setup

  ○ Warehouse staff data entry

  ○ Low-level troubleshooting on warehouse floor

○ Create your training schedule

  ○ Create your in-person training schedule - particularly important in shift-based workforces

  ○ Decide on deadline for completion of e-learning modules, if using

  ○ (OPTIONAL) agree on gamification incentives for completion of training

✔ **KEY WMS USER GROUPS CHECKLIST**

○ Senior management

○ Accounting and finance

○ Warehouse staff

○ Supply chain workers

○ Sales team

PLAN AND INITIATE YOUR WMS GO-LIVE

If there's one area of your WMS implementation that needs a concrete plan, it's the go-live phase. This is the official 'switch on' for your new WMS, so the stakes are high.

Outlining a detailed communication strategy is essential in completing this step successfully. Your team members should understand both their own responsibilities and those of other team members; this way everyone knows who to contact about any potential issues during system downtime.

It's also essential to communicate your plans to the wider workforce - they will be affected too, so you should give them time to adjust schedules and activities accordingly.

✔ WMS GO-LIVE CHECKLIST

- ◯ Test your WMS before going live
  - ◯ Integration testing (eg SCM, ERP)
  - ◯ Functional testing
  - ◯ System testing
  - ◯ Performance testing
  - ◯ Stress testing
  - ◯ Usability testing with key user groups - supply chain, warehouse, sales, engineering, senior management, department management
  - ◯ Acceptance testing with key user groups - see above
- ◯ Create a communication plan for on-the-day go-live activities during system downtime
- ◯ Create and schedule data backup processes
- ◯ Schedule:
  - ◯ Staff overtime
  - ◯ Temporary staff hours
  - ◯ Network speed and reliability checks
- ◯ Conduct post go-live tests on new WMS

EVALUATE THE SUCCESS OF YOUR WMS IMPLEMENTATION

While you (hopefully) won't be embarking on another WMS implementation any time soon, it's important to evaluate the success of your project in the weeks and months after the go-live. Partially this is so that you can provide senior management with progress reports (they'll want to see how the investment is paying off), but it also helps you identify areas for improvement and fix them before they snowball into something more serious.

You'll have laid down some KPIs to help you do this way back at the change management stage, so this shouldn't take too much planning initially. Remember though - evaluating your WMS' performance isn't just a one-time thing. You'll need to continuously monitor your WMS' effect on your warehouse to see whether it has been as profitable an investment as you predicted, and whether you need to add any further customizations.

✅ TO CONSIDER IMMEDIATELY POST-IMPLEMENTATION

- ◯ Was the project on-schedule? If not, what went wrong?
- ◯ Was the project on-schedule? If not, what went wrong?
- ◯ Did you have all the resources we needed to complete the project effectively?
  - ◯ Where were there gaps?
  - ◯ How could you fill them?
- ◯ What went wrong, and how can you learn from it?
- ◯ Are key user groups embracing the new WMS? If not:
  - ◯ Why not?
  - ◯ What is the best way to deliver refresher training?

✅ TO MONITOR CONTINUOUSLY POST IMPLEMENTATION

- ◯ Have productivity levels increased?
- ◯ Have order fulfilment rates increased?
- ◯ Has client satisfaction increased?
- ◯ Have human errors decreased (e.g shipment errors, wrong due-date)?

○ Are your inventory processes more efficient?

  ○ Have accidental shortages decreased?

  ○ Is there less excess stock in your warehouse?

○ How many months post-implementation is your WMS producing a positive ROI?

○ Are staff continuing developing workarounds as they get to know your WMS better? If so consider:

  ○ Retraining

  ○ Further customization or additional modules

This guide was written by Kathryn Beeson, Explore WMS Editor

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