



WHITE PAPER

# WMS SELECTION SIMPLIFIED

Proven Strategies for Choosing the  
Perfect Fit

# SO YOU'RE LOOKING FOR A WMS

You're reading this because you know that selecting and implementing a Warehouse Management System (WMS) isn't a job to be taken lightly. It's a massive responsibility, that if done wrong, may cost you your job (or your business!). Whether you're in the market for a new WMS because of business growth, outdated technology, or a need to optimize your warehouse operations, the selection process is the same. If you choose right, you'll help your operation stay competitive, improve efficiencies, boost customer satisfaction, and support future growth.

And while you may think choosing the right WMS is as easy as choosing one featured in the Gartner® Magic Quadrant™ for Warehouse Management Systems, it simply isn't. While the Magic Quadrant is an excellent source that should be consulted, there are many more systems out there that don't make the Gartner cut. With some upfront research, a detailed look into Request For Proposals (RFPs), solution demos, and some thought, you can select a WMS that not only serves you now, but sets you up for success years down the road.

In this White Paper, we'll share the Cornerstone Edge approach to WMS selection. We will discuss how to navigate the discovery phase, what vendor selection entails, and how to account for complexity, cost, and relevance. We've evaluated over 80 different solutions in the last decade, so we have a few tricks up our sleeve we're going to share with you. Let's get started.



# START BY LOOKING INWARD

The first thing to remember is that selecting a new WMS requires patience, research, and thought. We recommend using a phased approach, starting with the delineation of what your business requirements are. Then, you can move to the initial selection of candidates which gets narrowed down after each phase. This will enable you to dive into the specifications you have so you're not moving ahead with a provider that isn't an ideal fit.

Start by determining what your business needs to justify this investment, get to know the ins and outs of the operation, and leave no stone unturned. You can do this by asking the right questions.

- What are the current pain points and challenges in warehouse operations?
- Are there any bottlenecks or inefficiencies in the warehouse processes?
- Are there any specific customer demands or expectations that need to be addressed?
- How is inventory management currently handled, and are there any issues or areas for improvement?
- What is the current level of order accuracy and fulfillment speed, and how can it be improved?
- Is there a need for better visibility into inventory levels, locations, and movements?



# START BY LOOKING INWARD CNTD.

- Are there any safety concerns or compliance requirements that need to be addressed?
- What technology tools or systems are currently in place, and are they meeting the operational needs effectively?
- How can data and analytics be leveraged to gain insights and make informed decisions?
- Is there a need for better integration and communication with other departments or systems?
- What are the future growth plans and scalability requirements for the warehouse?
- How can the warehouse contribute to cost savings or revenue generation?

You want to understand where your operation is unique, what your budget is, what requirements are necessary, and which are nice to have. Having these answers will serve as a helpful guide for the entire process.



# THE INITIAL ROUNDUP

With those answers, you're ready to start looking at the various vendors out there. This initial list should be expansive, at this point, you're keeping your options open. But don't worry, this is just the beginning, the list will narrow more and more with each step to ensure you find the fit that's right for you. To create your initial list, there are several things you can do:

- Consider the most recent Magic Quadrant
- Poll your contacts on LinkedIn for references
- Revisit providers that have served you well in the past
- Consider new and upcoming thought leaders who have yet to pursue the challenge of being included in the Magic Quadrant

A WMS is not one-size-fits-all, so this upfront work is critical. You'll want to consider vendors that look good at a high level and eliminate any obvious mismatches during this round.



# THIN OUT THE RANKS

With this initial list, you can start evaluating the vendors based on criteria that are important to your operation and eliminate the ones that don't deliver. These criteria can be varied, but we suggest:

- Ability to deliver on specific business requirements
- Total cost of ownership
- Long term viability
- Product support
- Technology: database structure, cloud VS on-premise
- System integration
- Warehouse complexity

Seeing how the solutions rank based on these criteria will help you select which ones to forget, and which ones are worth selecting for an RFP. You'll want to develop an RFP with detailed requirements, both functional and technical. There are a variety of pre-written RFP templates available for free online. Use one as a starting point, but customize it for your needs. Partnering with a supply chain consultant can be very helpful in developing your RFP. Once the RFP has all the parameters you require, it's time to send them out to your selected vendors!



# REFINE, REFINE, REFINE

With completed RFPs in hand, it's time to start digging deeper. RFP responses will answer a slew of questions that will help determine who is worth inviting in for a demonstration, and who isn't the right fit. We recommend using numerical ranking as you evaluate the RFPs so that vendors can be scored against each other objectively. At Cornerstone Edge, we have 18 different criteria we use to score each vendor, based on functional requirements, financial strength, installation success, and more:

- 1.RFP Scoring - Functionality - General WMS Capabilities
- 2.RFP Scoring - Functionality - Inbound: Receiving
- 3.RFP Scoring - Functionality - Inbound: Putaway
- 4.RFP Scoring - Functionality - Outbound: Picking
- 5.RFP Scoring - Functionality - Outbound: Packing/Shipping
- 6.RFP Scoring - Functionality - Returns
- 7.Cost - Total 10-year cost (license/maintenance or cloud)
- 8.Cost - Professional Services (for initial two facilities)
- 9.Technology - Integration: capabilities to integrate with ERP and other systems
- 10.Technology - Integration: capabilities to integrate with Warehouse Control Systems
- 11.Technology - Database
- 12.Technology - Development Tools for flexibility and customization
- 13.Service Level - RFP response and follow-up
- 14.Service Level - RFP accuracy and honesty
- 15.Service Level - U.S.-based support
- 16.Viability - Specific industry background
- 17.Viability - Financial strength
- 18.Viability - Installations

Use this scoring card to determine which vendors you want to invite for a demonstration.





## SEE IT IN ACTION

Now that you have a shortlist of between three to five vendors, it's time to get demonstrations scheduled. To get the best out of this time, create a demonstration script based on the key functionalities listed in the RFP. This will allow you to see firsthand how well the vendor can deliver for each key functionality listed. Once again, weighted numerical ranking as used in the RFP will help provide an objective comparison between solutions. Ask vendors to come for a one-day, detailed, on-site demonstration.

On-site demonstrations are your chance to test-drive the solution, so be ready with questions and scenarios, anything that will help you see whether the solution can meet all your needs. It also provides you with a chance to reevaluate the solutions to see how they compare against each other in practice, not just on paper.





# MAKE THE CHOICE

If the demo doesn't leave you with a clear finalist, and you're left choosing between two solutions, that's fine! You can now compare both options based on functionality differences and technical preferences, adding economic and contractual factors to consider too. Remember, depending on your needs, business functional requirements may take precedence over technical or financial criteria. There are other criteria you can use to make the final decision, this is the time to be nit-picky:

- **Platform Considerations:** Code changes to the base system, upgrade control, shared database, security, risk mitigation, disaster recovery, and direct access to live data.
- **Technical Considerations:** Cloud provider, browser compatibility, cloud security, upgrades, RF-device support, interface capability, new version upgrades, import/export with Excel, voice capability, reporting tools, business intelligence tools, existing automation integration, system SLA, scalability, etc.
- **Configurability Considerations:** Change control, process workflow, visual label configuration tool, coding changes, and application security.
- **Implementation and Support:** Onsite vs remote, implementation team location, fixed bid implementation, methodology provided with RFP, implementation team or partner.
- **Support:** Response time, published consulting rates, disaster recovery.



# THE POWER OF CHOICE

There you have it! A roadmap for selecting a WMS you can be sure is the right fit. For some of you, this upfront work is right up your alley. For others, it's a process that may seem foreign or arduous, or simply too time-consuming. No matter what, we can help! With decades of experience vetting, implementing, and assessing WMS functionality, we have the know-how needed to help you choose the WMS that will enhance your business offering without hindering your operations in the process.

Are you ready to get started? We are! Let's talk.

