EXPLORE**WMS**

WMS SOFTWARE
RFP GUIDE

FORMULATED BY INDEPENDENT INDUSTRY EXPERTS

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AN INTRODUCTION TO WMS RFPs

A request for proposal (RFP) is a critical tool for selecting a warehouse management system.

Whether you are implementing a new system or upgrading an existing one, a well-structured RFP ensures vendors understand your needs and allows you to compare responses on an equal footing.

Before drafting an RFP, document and prioritize your WMS requirements. A vague or disorganized document will slow the selection process and increase the risk of choosing a system that does not meet your needs (an issue that won't necessarily come to light until much later).

KEY PREPARATIONS

Before reaching out to vendors, make sure all stakeholders are aligned on:

- Current challenges and why a new WMS is needed.

- Prioritized requirements, from essential features to future needs.

- Integration expectations with existing software and hardware.

- Operational goals, such as improved accuracy, faster fulfilment, or better labor management.

If your requirements are still unclear, **stop**. Gather input from stakeholders across warehouse operations, IT, finance, and management before engaging vendors.

CONTEXT AND CURRENT STATE

Your RFP should provide vendors with enough background to tailor their proposals. Cover your warehouse footprint, operational scale, and key metrics that define success for your business. Avoid writing the RFP from a single department's perspective. Include every relevant function, from receiving to shipping.

WHY A WELL-DEFINED WMS RFP MATTERS

The success of your WMS implementation largely depends on the clarity and precision of the RFP. An overly generic one can result in misaligned vendor responses, making it difficult to accurately compare software.

A poorly structured document may also lead to unnecessary features, overlooked critical requirements, and unexpected costs. Clearly outlining the business' needs, operational workflows, and scalability expectations helps vendors provide accurate proposals tailored to your goals. Remember: **what seems obvious in your board meetings may not come across that way in vendor discussions**, particularly where your unique warehouse complexities are concerned.

BUSINESS INFORMATION

This section sets the stage. Vendors should immediately understand your operations, processes, and expectations.

COMPANY INFORMATION

Include fundamental details such as:

- **Company name, headquarters, and operational sites** (including any international presence).

- **Years in operation and industry specialization**: vendors may have industry-specific solutions that fit your business, warehouse locations, sizes, and capacities.

- **Markets served**: Do you operate in B2B, B2C, or a hybrid model? Vendors need to understand your distribution approach.

- **Warehouse network and fulfillment strategy**: Detail the number of warehouses, their sizes, storage capacities, and whether they serve specific regions or functions.

- **Operational scale and seasonal demand**: Be transparent about average order volumes, inventory turnover rates, peak season fluctuations, and projected growth.

WAREHOUSE OPERATIONS AND CHALLENGES

Explain why you are searching for a new WMS. Are you replacing a legacy system that no longer meets your needs? Expanding to new fulfillment models?

Struggling with inefficient processes? The more clarity you provide, the better vendors can respond with relevant solutions. **AI-enhanced systems** are becoming more prominent and accessible. That functionality could be just what your organization needs to shore up its workflows.
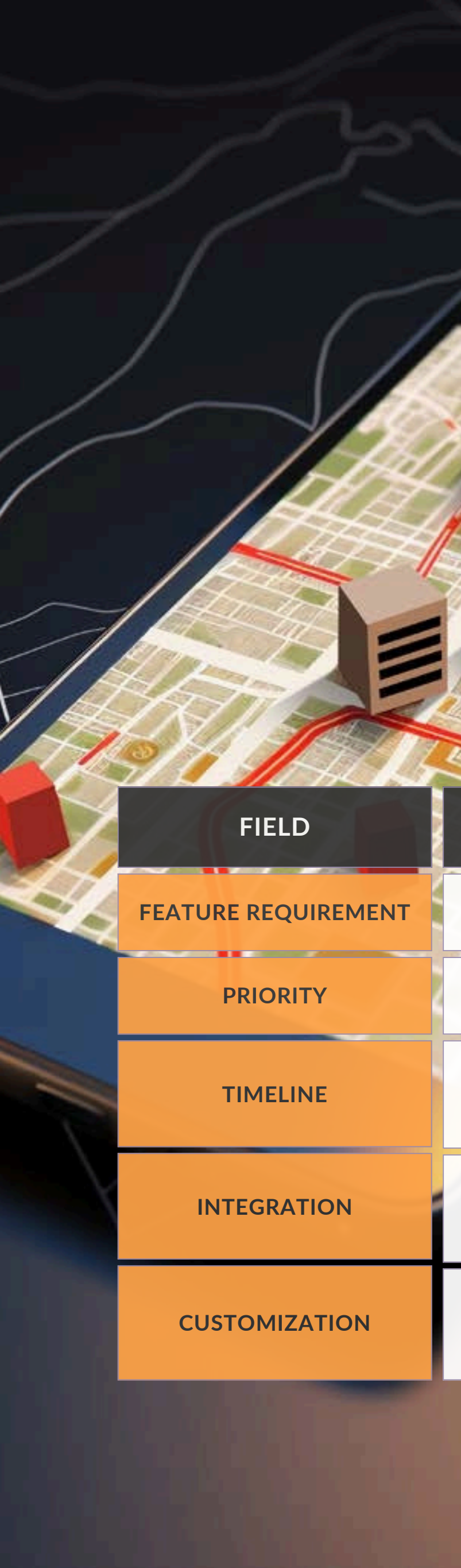
CURRENT TECHNOLOGY STACK

Document your existing hardware and software, including:

- ERP, TMS, and other systems the new WMS must integrate with.

- Physical infrastructure such as barcode scanners, RFID systems, and robotics.

- Cloud vs. on-premise preferences.

This information helps vendors determine compatibility and potential integration challenges.
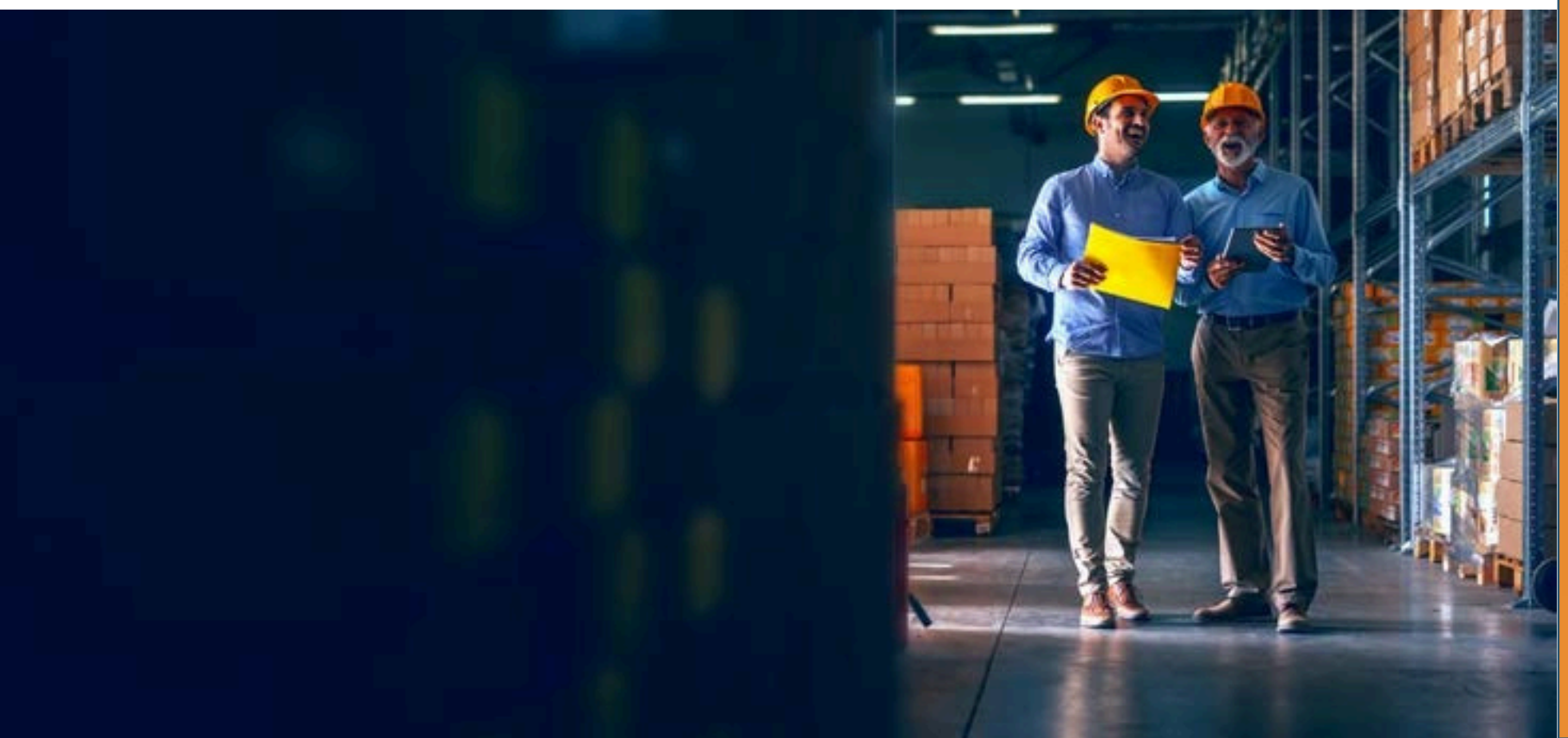
BUSINESS REQUIREMENTS

After setting the business context, clearly define your WMS requirements. Organize them into functional categories that align with your warehouse operations.

PROCESS SCHEMATICS & WORKFLOWS

If applicable, include diagrams outlining key warehouse workflows. Vendors should see how your warehouse operates and where a WMS must improve efficiency.

REQUIREMENT DETAILS

Each requirement should be documented with the following details:

FIELD	DESCRIPTION
FEATURE REQUIREMENT	The specific WMS functionality needed
PRIORITY	Must-have, nice-to-have, or future consideration
TIMELINE	When the functionality is required (immediate, 6 months, etc.)
INTEGRATION	Existing systems the WMS must connect with (ERP, TMS, etc.)
CUSTOMIZATION	Whether the requirement must be out-of-the-box or if custom development is acceptable

SCALABILITY AND FUTURE GROWTH

Specify anticipated growth over the next three to five years, including:

- Warehouse expansion plans.

- Increases in order volume or SKU count.

- Additional automation or robotics investments.

A structured RFP response format improves evaluation and simplifies decision-making. Define exactly how vendors should reply.
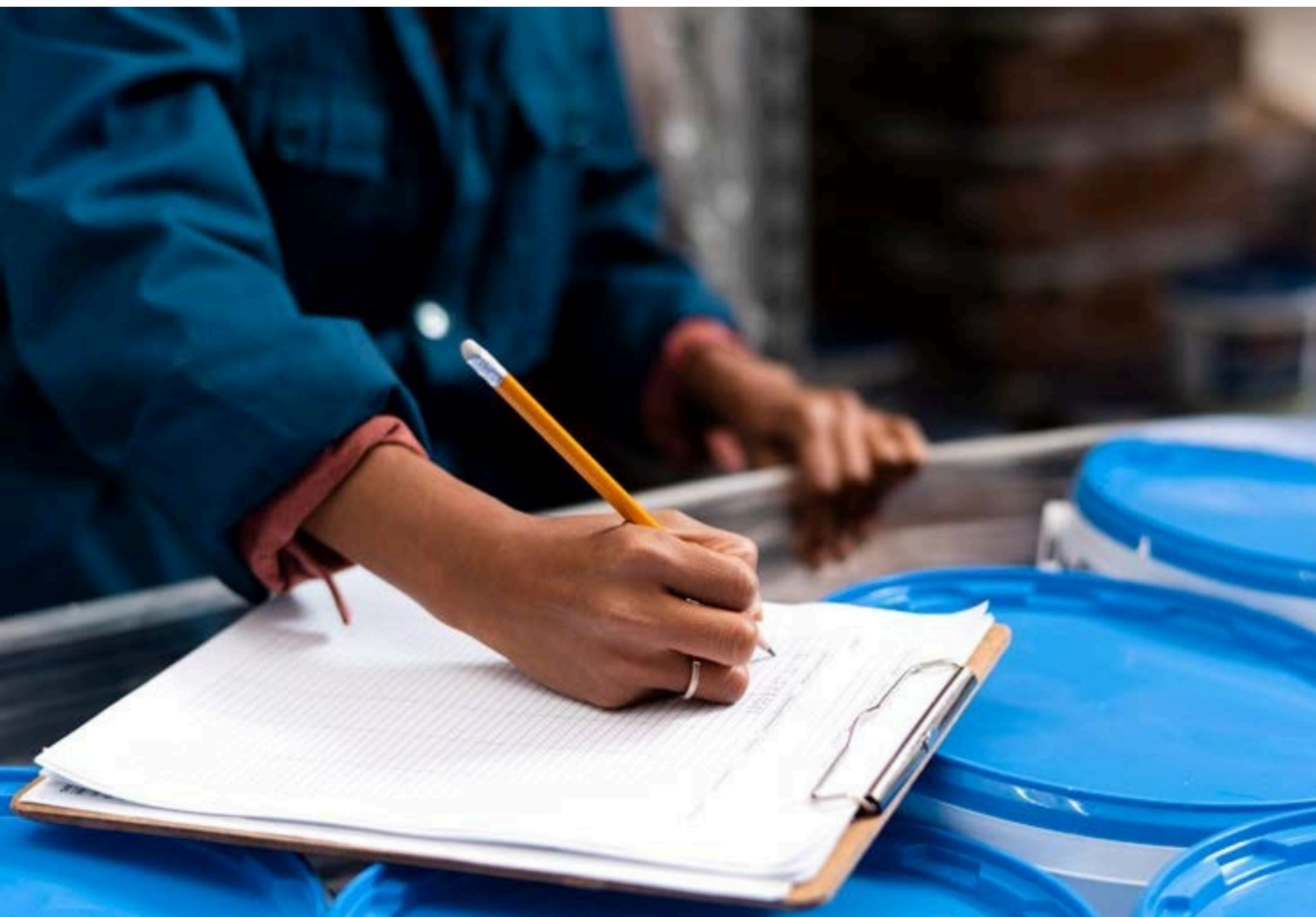
REQUIREMENTS TEMPLATE

This section sets the stage. Vendors should immediately understand your operations, processes, and expectations.

VENDOR RESPONSE KEY

- **OOB:** Available out-of-the-box.

- **CUS:** Available through customization.

- **BOL:** Available as a bolt-on module (extra cost).

- **3RD:** Available via third-party integration.

- **FUT:** Planned for a future release (include estimated date).

- **N/A:** Not available.

IMPLEMENTATION & SUPPORT

Ask vendors to outline:

- The implementation timeline and milestones.

- Their training and onboarding process.

- Post-implementation support and SLA details.

REFERENCES & CASE STUDIES

Vendors should be able to offer at least three customer references, ideally from businesses with similar operational complexity. Ask them to provide

- Customer industries and warehouse sizes.

- What key WMS features were implemented.

- The performance improvements achieved.

FINANCIAL CONSIDERATIONS

If an RFQ (request for quote) is to follow, state that cost details will be collected separately. Otherwise, request:

- Total cost of ownership (TCO) projections over three to five years.

- Licensing, maintenance, and support costs.

- Customization and integration fees.

SELECTION CRITERIA

A structured evaluation process prevents bias and ensures the best fit. Define your scoring criteria before reviewing vendor responses.

Assign a weighted score to each factor and involve a cross-functional team in the evaluation.

FACTOR	WHAT TO LOOK FOR
REQUIREMENT FIT	Meets core functionality with minimal customization
EASE OF USE	Intuitive interface, mobile accessibility
INTEGRATION	Compatibility with ERP, TMS, and hardware
SCALABILITY	Can support growth without excessive costs
SUPPORT & RELIABILITY	SLAs, uptime guarantees, user community
TOTAL COST OF OWNERSHIP	Transparent pricing over multiple years
CUSTOMER REFERENCES	Proven success in similar warehouse environments

RED FLAGS

Eliminate vendors who:

- Provide vague, non-specific responses.
- Avoid addressing customization and integration challenges.
- Have unclear or unrealistic implementation timelines.
- Lack strong customer references.

Further reading — ⊡ ✕

There are further resources on the topics discussed in this guide available at:
https://www.explorewms.com
Alternatively, you can email
customerteam@explorewms.com
for further assistance with your warehouse software project.