

WMS SOFTWARE DEMO GUIDE

FORMULATED BY INDEPENDENT INDUSTRY EXPERTS



INCLUDES A VENDOR DEMO SCORECARD

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INTRODUCTION

The warehouse lies at the heart of your business operations. If you're looking for a new WMS, you've likely already done online research and watched vendor videos.

These online demos and landing pages show user screens and highlight strengths, but they tend to gloss over limitations. Treat them as initial screening tools. To make a sound decision, plan structured live demos (on-site or online) with vendors so you can see the system in action and ask real questions. This guide walks through the demo process from start to finish and ends with a scorecard template for evaluating each vendor.

THE BASICS

VENDOR VIDEOS AND PRESENTATIONS:

Many WMS vendors post overview videos or pitch decks. These are quick to watch and help you learn each system's terminology and UI. However, remember these are marketing materials; they show the system at its best and **skip over weaknesses**. Use them to decide which vendors deserve a closer look, but don't rely on them to make a final decision. After watching, discuss what you saw with your team to spot any obvious gaps before moving on.

ONLINE TRIAL OR SANDBOX DEMOS:

Some vendors provide live demo accounts or interactive trials. You log in and work through sample scenarios with a prepared data set. These can be useful to test basic functionality (receiving, picking, shipping, etc.). Note that such trials are often limited. They may not include all your products or custom processes. If a system meets many of your needs in a trial, plan to follow up with a guided demo.

LIVE DEMONSTRATIONS:

The most informative demos are instructor-led, either at your site or via web conference. During these, a product specialist walks through your key workflows. Because vendors have standard demo scripts, insist on controlling the agenda.

Send them your requirements and scenarios in advance, and ask to see every critical function you need. That way, the demo covers how the WMS handles your specific warehouse operations (inventory tracking, putaway, picking, cross-docking, returns, reporting, etc.). Take notes and make sure each team member understands what was shown.



ASSEMBLING YOUR DEMO TEAM

Select a cross-functional group so all perspectives are covered. Key participants might include:

EXECUTIVE SPONSOR (E.G. CEO OR VP OF OPERATIONS):

An executive champion should attend at least part of each demo. They care about high-level goals like ROI, compliance, and company-wide visibility. Even if they don't need to see every process, their presence signals support and helps ensure big-picture requirements (budgets, KPIs) are addressed.

WAREHOUSE/OPERATIONS MANAGERS:

The warehouse or distribution manager (and any supervisors) should be present. These people understand daily workflows (receiving, picking, packing, shipping) and can judge if the WMS meets operational needs. They will use the system constantly, so their approval is essential.

IT AND TECHNICAL STAFF:

Include your IT lead or systems integrator. They will ask about technology – e.g. how the WMS connects to your ERP, scanning devices, barcode printers, RFID or scales, and networks. They can verify that data flows (inventory, orders) will integrate cleanly with your existing systems.

WAREHOUSE FLOOR AND BACK-OFFICE USERS:

Involve a representative group of end-users – inventory clerks, forklift operators, pickers/packers, receiving staff, etc. These “everyday users” can point out ease-of-use issues. For example, are mobile scanners intuitive? Does the picking workflow make sense? Their practical questions (like “*how do I handle a shortage?*”) often reveal limits or gaps.

OTHER STAKEHOLDERS:

Depending on your operation, include representatives from Quality (for lot/serial tracking), Purchasing (for reorder processes), or Customer Service (if customers track orders through the WMS). You may not seat everyone at once; larger teams often split segments of the demo, but try to cover all viewpoints.

TEAM COORDINATION:

Designate someone to record the meeting or take thorough notes. Give demos to those who must attend, and share the recordings or a summary with others afterwards. This way, the rest of your company stays informed even if they couldn’t watch live.





PLANNING FOR VENDOR DEMOS

Proper preparation will make your demos efficient and informative:

CLARIFY YOUR REQUIREMENTS:

Before demos begin, list your **must-have** requirements (e.g., inventory accuracy targets, throughput goals, and reporting) and also **nice-to-have** features (e.g., integrations with new systems and AI predictive analytics). Prioritize these. Make sure your core reasons for switching WMS (higher efficiency, fewer stockouts, lower labor cost, etc.) are documented and agreed upon by your team. These points will guide your demo script.

DRAW UP A DEMO SCRIPT:

Vendors usually have scripted demos. To get the most, create your own script or scenario list based on your needs; you might outline a sequence: *"Receive a truck with mixed products; show putaway and bin control; pick a batch of mixed orders; demonstrate cross-docking a partial shipment; process a return."*

Send this script to each vendor in advance and require them to follow it. This forces them to show you the functions you care about. It also lets you reorganize the sequence so that critical segments line up with the right attendees.

TEST INTEGRATIONS AND CONFIGURATIONS:

Identify any customizations or integrations you'll need. If you have an ERP, e-commerce site, or specific shipping carriers, plan to have the demo cover at least one integration scenario.

For example, ask the vendor to demonstrate how an order from your ERP enters their WMS, or how a package is shipped via FedEx from the system. Ask about configurability too. If you'll use advanced processes (e.g. advanced picking methods, voice picking, RFID tracking, lot/serial control, etc.), include these in your scenarios to see how easily they can be set up and used.

USE A DEMO SCORECARD:

Prepare a scorecard listing each key requirement or feature (from both your must-have and nice-to-have lists). You'll rank how well the vendor's system performs on each item.

Decide on a consistent rating scale (for example, 1 = fails to meet the need up to 5 = fully meets the need). A ready scorecard keeps your evaluation objective and uniform across vendors.

SCHEDULE AND LOGISTICS:

Confirm the demo date, time, and participants with each vendor. Book a meeting room or set up a Zoom/Google meeting room. Make sure all technical arrangements (projector, phones, remote link) are tested. Send reminders to your team so the right people attend each part.





WHAT TO DO DURING THE DEMOS

With planning done, it's time to conduct the demos:

INVITE THE RIGHT PEOPLE:

Ensure each session has those responsible for the focus area. For example, if boosting order-fulfillment speed is a top goal, include your picking and shipping supervisors. If financial reporting is a concern, have an inventory analyst or buyer present.

If you need strong IT integration, make sure technical staff attend. If someone can't stay the whole time, have them join only the segments most relevant to their team, then leave for others they trust.

ASK FOCUSED QUESTIONS:

Prepare specific questions in advance. Instead of asking general benefits, ask to see real workflows:

- *"Show us the steps for processing a return shipment."*
- *"How does the system handle a missing item during picking?"*
- *"Demonstrate how a replenishment transfer is created when stock runs low."*

Encourage multiple team members to ask similar questions at different points. (Different viewers might catch different nuances in the answers.) Follow up on anything unclear on the spot.

CONTROL THE AGENDA:

If the demo starts drifting into irrelevant areas, politely steer it back to your script. For example, you could say, *"This is interesting, but can we move to the next item on our list?"*

Make sure all your high-priority requirements get covered. If the vendor tries to spend too much time on flashy features you don't need, redirect them to your core topics.

ENGAGE EVERYONE:

Encourage attendees to participate. Ask them to note down how each feature was shown. If someone thinks of a test scenario on the fly, they should voice it. Active participation helps reveal strengths or gaps.

TAKE NOTES AND SCORE IMMEDIATELY:

Immediately after each demo, have everyone fill out their copy of the scorecard before impressions fade. Rank each feature on your scale and jot down comments, for example:

- *“Needs third-party add-on for this.”*
- *“Easy config through settings.”*
- *“AI assistant data visualization is limited (demand forecasting, productivity.)”*

Also answer any qualitative questions you set (see scorecard on page 13). Scoring as you go ensures you remember details and have concrete comparisons later.





EVALUATING DEMOS

After all demos are done, use your scorecards to compare and decide:

REVIEW BASIC INFO:

Compile the key facts for each demo: WMS vendor/name, demo date, presenters. Make sure you match scores to the correct system.

RATE EACH REQUIREMENT:

For each requirement or feature on your list, take everyone's scores and compute an average (or use a pre-defined formula). Use the scale you chose (for example, 1–5 where 1 = fails to meet requirement, 5 = perfectly meets requirement). Also review the notes: did the system meet the need well? Were any limitations or concerns noted? Record any disqualifying issues (e.g. a score of 1 or 2 on a must-have feature is a serious red flag).

ASK QUALITATIVE QUESTIONS:

Go beyond numbers and ask everyone: Was the presentation clear and professional? Did the vendor answer questions directly and stay on schedule? Did they address our key points sufficiently, or waste time on unrelated features? Note any general impressions; if someone felt uneasy about a particular system or saw unexpected bugs.

COMPARE TOTALS AND DISCUSS:

Sum up each demo's scores to get an overall ranking. Highlight the top-ranked vendors. However, don't rely on scores alone. If one system scored slightly lower but everyone felt it was easier to use, it may be preferable. Check for outliers (if one reviewer's score wildly differs from the rest, ask why). Sometimes one person spots an issue others miss.

SELECT FINALISTS:

Use the quantitative and qualitative data together to pick your finalists. Often 2–3 systems emerge as clear leaders. Share the aggregate results with your team and get consensus. Those top few vendors can then proceed to detailed reference checks, pricing negotiations, or contractual discussions.

PLAN NEXT STEPS:

Whether it's another round of demos on specific points or moving to a pilot, decide how to test the finalists further. Make sure everyone knows the decision criteria that matter (functionality, usability, cost, vendor support, etc.) as you move forward.



Find your demo scorecard on the next page!



TEMPLATE DEMO SCORECARD

Use the following template during demos to assess each WMS. Copy it for each system you evaluate, and fill it in immediately after the demo. The score indicates how well the system met the requirement (1 = fails to meet need, 5 = excellent fit).

Your name:

Date of demo:

WMS vendor/system:

Presenter(s):

Requirement/feature	Score (1-5)	How well met/notes
Real-time inventory tracking		
Mobile app functionality		
Integration with [your ERP]		
Cross-docking capabilities		
Order picking process		

ADDITIONAL QUESTIONS:

- Was the demo well-organized and clear?



Comments: _____

- Did the vendor focus on our priorities?



Which points got too little or too much time?

- Did any important topics go unaddressed?

- Any reservations or follow-up needed?

Use this scorecard for all demos. After each session, review and score with your team so you can rank each solution objectively.

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.

