WMS IMPLEMENTATIONS

Deciphering Vendor and Client Responsibilities

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INTRODUCTION

One of the most critical responsibilities of a supply chain leader lies in selecting the right enterprise software for your organization. Equally important however is the successful implementation of the software. A successful implementation requires input, collaboration, and expertise from both the software vendor and the client implementing the technology.

It may be tempting to think the software vendor will take care of the implementation in its entirety, but that is simply not the case. In fact, one could say most of the essential responsibilities lie with the client. The gap between the business requirements and what the vendor provides will determine what the client's responsibilities are. **In this paper, we'll decipher vendor and client responsibilities for a successful warehouse management system (WMS) implementation.**

GETTING STARTED

VENDOR RESPONSIBILITIES

Once the client has signed on the dotted line, the vendor provides system documentation and is responsible for outlining the steps needed for every phase of the implementation, often referred to as the RACI matrix. RACI stands for Responsible, Accountable, Consulted, and Informed, and it helps make projects run more smoothly by giving team members specific actions to work toward. This list will provide clarity on what the vendor will be doing, and what is expected of the client.

CLIENT RESPONSIBILITIES

Once the software has been selected and a client is prepared to proceed with implementation, it is time for the client to clearly define expectations for the WMS project, including goals, timeline, and budget.

The vendor will provide a software implementation team, but this team will depend on the client for information about the operation's needs and supply chain processes. The client is responsible for ensuring the vendor implementation team thoroughly understands the operation's goals and requirements. This way, they can effectively communicate any challenges that need to be addressed by the vendor's team.

CLIENT RESPONSIBILITIES

EXPECTATIONS

It is the client's responsibility to:

- Identify problem areas in the operation that need attention
- Communicate operational processes accurately
- Provide clarity on issues and processes regarding key customers
- Detail necessary interfaces needed with shipping carriers and other systems including, TMS, ERPs, material handling solutions, scales, etc.
- Provide an exhaustive list of all mobile hardware solutions, RFID, printers, and other technology
- Determine if other third-party solutions will be needed

Another critical key to success that the client is responsible for is selecting an internal Project Manager (PM) for the entire implementation. The PM will serve as a single point of contact between the organization and vendor, ensuring all information, data, and deliverables are accounted for.

CLIENT RESPONSIBILITIES

TEAM

The client will also be responsible for putting together a team of subject matter experts to be dedicated to the project. Their expertise should cover every department of the warehouse, including warehouse/operations, sales, IT, customer service, finance, quality assurance/quality control, and manufacturing.

TIMELINE

The client is responsible for selecting a go-live date and creating a go-live checklist with names and dates, ensuring team members are accountable for their tasks throughout the process. The go-live checklist will ensure team members are ready, and account for testing and training time. The checklist should also include a contingency plan for when errors occur. Mistakes will happen, it's unavoidable in a project so large, so having a plan in place to face the challenges is an excellent way to safeguard the project's timelines and bottom line.

IN THE THICK OF IT

VENDOR RESPONSIBILITIES

During the implementation, the vendor will work on addressing all the customization requirements of the client. The vendor will consult the business requirements list along with the current challenges and will create customizations to address those needs.

The vendor is also responsible for the initial testing phase — Unit Testing. This test examines the entire system to ensure it is fully functional; it serves as a baseline test and is the first test of many.

CLIENT RESPONSIBILITIES

TESTING
nce the implementation is underway, this is when the work really begins. While the vendor takes care of providing system documentation, it is the client's responsibility to prepare testing and training documentation that will ensure all of the business requirements have been addressed.

Once the vendor has completed Unit Testing, the rest of the testing follows, all of which fall under the client's obligations. Test scenarios and scripts should be very detailed and list all of the tasks and expected results.

- System Integration Testing (SIT)
- User Acceptance Testing (UAT)
- Readiness Testing (RT)

CLIENT RESPONSIBILITIES

TRAINING

One of the client's most important responsibilities is training. The team member selected as a trainer in the pre-implementation phase will have received system training from the vendor throughout the testing cycle. It will then be their responsibility to train the rest of the staff utilizing training documentation developed for each audience type.

Effective training documentation includes:

- Work Instructions (how-to for every screen)
- Process Maps
- Failure Mode Effects Analysis (FMEA)
  - What could go wrong
  - What are the causes of those errors
  - What controls are in place to address errors
  - What is the risk if the worst happens
- Standard Operating Procedures (SOPs)
  - What to do when something goes wrong

DURING GO-LIVE

The go-live date is a monumental one. Both the client and vendor teams will be busy, working on multiple fronts to get the implementation underway. By this point, the client and vendor teams will have already determined who from each team will be there for the go-live. As both teams prepare for the event, there are a series of questions and considerations they should discuss as a team, to better prepare for the day ahead. These include:

- How much time will be required to perform the cutover?
- What is the best day and time to stop the operation? Bearing in mind that all operational and interface transactions will have to cease during the cutover.
- What is the ramp up plan? When do you expect to be back to 100%?
- SMEs need to be scheduled to support each shift for at least the first 2 weeks.
- What support will the software vendor be providing?
- Are contingency and issue escalations plans are in place?

CONCLUSION

Understanding the roles and responsibilities of the vendor and client is a critical step in the overall success of a WMS implementation. As evidenced by the information here, the client has a multitude of responsibilities during an implementation, on top of the task of continuing to run the operation during a time of great change.

Sometimes, hiring a consultant to manage the client-side responsibilities of an implementation is the best option to ensure a smooth process. At Alpine Supply Chain Solutions, we pride ourselves on providing system implementation services that ensure successful WMS implementations. Check out the work we've done with HJI Solutions and Monat Global. If you're looking for expert assistance with an enterprise software implementation, we're here to help.

ABOUT ALPINE:

Alpine Supply Chain Solutions is a supply chain consulting company driven to ensure their clients get the most value from their investments. Their approach to every project starts with the data and ends with a cost justifiable solution. With deep roots in industrial engineering, Alpine's approach is unique.