



Warehouse WMS Capacity Planning Checklist

Demand Forecasting Accuracy

Assess the accuracy of current demand forecasting methods and identify areas for improvement.

Forecast Accuracy Rate (%)

Description of Forecasting Methodology

Software Used for Forecasting

- ☐ Excel
- ☐ Dedicated Forecasting Software
- ☐ Other

Average Forecast Error (Units)

Date of Last Forecast Review

Enter date...

Data Sources Used for Forecasting

- ☐ Historical Sales Data
- ☐ Market Trends
- ☐ Promotional Plans
- ☐ Economic Indicators

Storage Space Utilization

Evaluate current storage space utilization rates and identify opportunities to optimize layout and racking.

Overall Rack Space Utilization (%)

Enter a number...

Average Pallet Density per Rack Level

Enter a number...

Racking Type in Use

- ☐ Selective Pallet Racking
- ☐ Drive-In Racking
- ☐ Flow Racking
- ☐ Pallet Shuttle
- ☐ Other

Description of Current Storage Layout

Write something...

Percentage of Empty Rack Locations

Enter a number...

Areas of Low Utilization (Select all that apply)

- ☐ Top Rack Levels
- ☐ Back of Warehouse
- ☐ Specific Aisles
- ☐ Seasonal Storage Areas
- ☐ None

Receiving Capacity Assessment

Analyze current receiving capacity, including dock doors, labor, and equipment, to determine potential bottlenecks.

Number of Dock Doors

Enter a number...

Average Daily Receipts (Units)

Enter a number...

Peak Daily Receipts (Units)

Enter a number...

Receiving Labor Available (Full-Time Equivalents)

Enter a number...

Current Receiving Process

- ☐ Manual
- ☐ Semi-Automated
- ☐ Fully Automated

Describe any current bottlenecks in the receiving process

Write something...

Date of last Receiving Capacity Review

Enter date...

Putaway Resource Evaluation

Review putaway labor and equipment, ensuring adequate resources to handle incoming inventory.

Current Number of Putaway Laborers

Enter a number...

Average Putaway Rate (Units/Laborer/Hour)

Enter a number...

Primary Putaway Equipment

- ☐ Forklift
- ☐ Pallet Jack
- ☐ Automated Guided Vehicle (AGV)
- ☐ Manual

Number of Available Forklifts/Pallet Jacks

Enter a number...

Description of Current Putaway Process

Write something...

Current Putaway Method

- ☐ Directed
- ☐ Random
- ☐ Zone
- ☐ FIFO

Average Time to Complete Putaway (Minutes)

Enter a number...

Picking & Packing Capacity

Analyze current picking and packing capacity, considering labor, equipment, and order profiles.

Average Orders Processed Per Hour

Peak Hour Order Volume

Number of Picking Stations

Average Pick Time Per Order (minutes)

Number of Packing Stations

Average Packing Time Per Order (minutes)

Picking Method

- ☐ Zone Picking
- ☐ Wave Picking
- ☐ Batch Picking
- ☐ Discrete Picking

Notes on Bottlenecks or Challenges

Write something...

Shipping Capacity & Dock Scheduling

Evaluate shipping capacity, dock door availability, and scheduling efficiency.

Number of Dock Doors Available

Enter a number...

Average Dock Door Utilization Rate (%)

Enter a number...

Maximum Number of Shipments Per Day

Enter a number...

Average Dock Door Turnaround Time (Minutes)

Enter a number...

Earliest Shipping Start Time

Enter time...

Latest Shipping End Time

Enter time...

Dock Scheduling Method

- ☐ First Come, First Served
- ☐ Priority Scheduling
- ☐ Appointment-Based

Labor Availability & Skill Sets

Assess current labor pool size, skill sets, and potential for future staffing needs.

Current Number of Warehouse Associates

Enter a number...

Projected Number of Associates Needed (Next 6 Months)

Enter a number...

Dominant Skill Set Deficiency

- ☐ Forklift Certification
- ☐ Picking & Packing
- ☐ WMS Software Proficiency
- ☐ Receiving and Inspection
- ☐ General Labor

Training Programs Currently Offered

- ☐ Forklift Certification
- ☐ WMS Software Training
- ☐ Safety Procedures
- ☐ Picking Optimization

Date of Last Workforce Skills Assessment

Enter date...

Description of Current Labor Challenges

Write something...

Equipment Maintenance & Reliability

Review equipment maintenance schedules and reliability to minimize downtime and disruptions.

Last Preventative Maintenance Date

Enter date...

Total Equipment Downtime (Hours) - Last Month

Enter a number...

Description of Recent Equipment Issues/Repairs

Write something...

Equipment Condition Rating (1-5)

- ☐ 1 - Critical
- ☐ 2 - Poor
- ☐ 3 - Fair
- ☐ 4 - Good
- ☐ 5 - Excellent

Next Scheduled Maintenance Date

Enter date...

Number of Critical Equipment Failures Last Quarter

Enter a number...

Automation Potential Assessment

Identify opportunities for automation to increase throughput and efficiency.

Describe current manual processes suitable for automation.

Write something...

Which automation technologies are being considered?

- ☐ Automated Guided Vehicles (AGVs)
- ☐ Automated Storage and Retrieval Systems (AS/RS)
- ☐ Robotics (Pick and Place)
- ☐ Conveyor Systems
- ☐ Voice Picking Systems
- ☐ Automated Labeling Systems

Estimated ROI (Return on Investment) for automation implementation.

Enter a number...

Estimated cost of automation implementation.

Enter a number...

Target implementation date for automation.

Enter date...

Level of automation being considered (e.g., Partial, Full)

- ☐ Partial Automation
- ☐ Full Automation

Peak Season Planning & Scalability

Review plans for handling peak seasons and assess the scalability of current processes.

Projected Peak Season Order Volume Increase (%)

Enter a number...

Additional Labor Needed (Full-Time Equivalents)

Enter a number...

Extra Dock Doors Required (Number)

Enter a number...

Start Date of Peak Season Prep (YYYY-MM-DD)

Enter date...

End Date of Peak Season (YYYY-MM-DD)

Enter date...

Peak Season Strategy

- ☐ Temporary Staffing
- ☐ Overtime
- ☐ Extended Hours
- ☐ Contracted Logistics

Potential Bottlenecks During Peak Season

- ☐ Receiving
- ☐ Putaway
- ☐ Picking
- ☐ Packing
- ☐ Shipping
- ☐ Order Management

Warehouse Layout Optimization

Evaluate the current warehouse layout for efficiency and identify areas for redesign.

Describe current warehouse layout challenges.

Write something...

Current average travel distance per pick (feet).

Enter a number...

Primary layout type (e.g., flow-through, U-shaped, I-shaped).

- ☐ Flow-Through
- ☐ U-Shaped
- ☐ I-Shaped
- ☐ Other

Which areas are experiencing bottlenecks?

- ☐ Receiving
- ☐ Storage
- ☐ Picking
- ☐ Packing
- ☐ Shipping

Describe proposed layout changes and rationale.

Write something...

Estimated reduction in travel distance with new layout (%).

Enter a number...