



# Warehousing Capacity Planning Checklist

## Demand Forecasting & Projections

Assess current and future demand to understand storage needs. This includes analyzing historical data, seasonality, and projected growth.

**Average Daily Order Volume (Current)**

**Projected Order Volume Growth Rate (Annual, %)**

**Start Date for Demand Forecast**

**End Date for Demand Forecast**

**Describe Key Factors Influencing Demand (e.g., seasonality, promotions, market trends)**

Write something...

**Peak Season Order Volume Multiplier (Compared to average)**

Enter a number...

**Upload Historical Sales Data (CSV/Excel)**

 Upload File

**Primary Forecasting Method Used**

- ☐ Historical Data Analysis
- ☐ Market Research
- ☐ Statistical Modeling
- ☐ Expert Opinion

# Current Warehouse Assessment

Evaluate current warehouse space utilization, storage methods, and operational efficiency. Identify bottlenecks and inefficiencies.

**Total Usable Square Footage (sq ft)**

Enter a number...

### Current Storage Utilization (%)

Enter a number...

### Description of Current Storage Methods (Racking, Pallet Stacking, etc.)

Write something...

### Number of Pallet Locations

Enter a number...

### Number of Bulk Storage Locations

Enter a number...

### Current Challenges/Bottlenecks (Select all that apply)

- ☐ Insufficient Space
- ☐ Inefficient Layout
- ☐ Poor Slotting
- ☐ Lack of Automation
- ☐ Labor Constraints
- ☐ Other (Specify in Long Text)

### Detailed observations/notes on current warehouse layout and operations.

Write something...

### Warehouse Layout Diagram/Map (if available)

 Upload File

## Storage Requirements Analysis

Determine the specific storage needs based on product characteristics (size, weight, fragility, temperature requirements, etc.) and order profiles.

### Average Unit Size (LxWxH in inches)

Enter a number...

### Average Unit Weight (lbs)

Enter a number...

### Average Pallet Size (LxWxH in inches)

Enter a number...

### Average Pallet Weight (lbs)

Enter a number...

### Storage Type Required (e.g., Temperature Controlled, Dry)

- ☐ Temperature Controlled
- ☐ Dry
- ☐ Humidity Controlled
- ☐ General Storage

### Special Handling Requirements

- ☐ Fragile
- ☐ Hazardous Materials
- ☐ Perishable
- ☐ Requires Rack Protection
- ☐ No Stacking

### Notes on specific product or category storage requirements

Write something...

### Units/Pallets per SKU (Estimated)

Enter a number...

## Space Optimization & Utilization

Explore opportunities to maximize existing warehouse space through improved layout, racking, automation, and storage techniques.

### Current Utilization Rate (%)

Enter a number...

### Detailed Description of Current Storage Methods (e.g., Pallet racking, flow rack, shelving)

Write something...

### Which racking/storage system modifications are being considered?

- ☐ Increased Pallet Racking Height
- ☐ Introduction of Flow Rack
- ☐ Implementation of Mezzanine Levels
- ☐ Use of Narrow Aisle Racking
- ☐ Vertical Lift Modules (VLM)
- ☐ None - Current layout sufficient

### Potential Space Gain (sq ft) from Layout Optimization

Enter a number...


### Priority for Vertical Space Utilization?

- ☐ High - Maximizing vertical space is critical
- ☐ Medium - Vertical space is important, but with limitations
- ☐ Low - Prioritizing other optimization methods

### Specific Constraints/Limitations to Space Optimization (e.g., structural limitations, safety regulations)

Write something...

### Current Warehouse Layout Diagram (for reference)

 Upload File

## Future Growth & Scalability

Plan for future growth and expansion needs, considering potential increases in volume, product lines, and order complexity.

### Projected Annual Growth Rate (Volume)

Enter a number...

### Expected Increase in SKU Count (Next 3 Years)

Enter a number...

### Describe Potential New Product Lines & Their Storage Requirements

Write something...

### Estimated Date of Next Major Capacity Review

Enter date...

### Forecasted Peak Season Volume Increase (%)

Enter a number...

### Potential Expansion Strategies

- ☐ Expand Existing Facility
- ☐ Lease Additional Space
- ☐ Build New Facility
- ☐ Outsource to 3PL

### Required Additional Pallet Positions (Estimate)

Enter a number...

**Describe any anticipated changes in product size or packaging**

Write something...

## Risk Assessment & Contingency Planning

Identify potential risks (e.g., disruptions to supply chain, unexpected demand spikes) and develop contingency plans to ensure capacity is available.

**Maximum Acceptable Stockout Duration (Days)**

Enter a number...

**Describe potential supply chain disruptions that could impact warehouse capacity.**

Write something...

**Identify potential risks affecting capacity (select all that apply)**

- ☐ Sudden Demand Spike
- ☐ Supplier Delays
- ☐ Equipment Failure (e.g., racking, conveyors)
- ☐ Labor Shortage
- ☐ Natural Disaster
- ☐ Unexpected Returns Volume
- ☐ Transportation Issues



### Estimated Lead Time for Temporary Storage Solutions (Days)

Enter a number...

### Date of Last Risk Assessment Review

Enter date...

### Outline contingency plan for a major equipment failure (e.g., primary racking collapse)

Write something...

### Primary Contingency Storage Option (if needed)

- ☐ Leased Space
- ☐ Partner Warehouse
- ☐ Temporary Structure
- ☐ No Contingency Required

## Technology & Automation

Evaluate the potential of warehouse management systems (WMS), automated storage and retrieval systems (AS/RS), and other technologies to improve capacity utilization and efficiency.

### Current WMS in Use?

- ☐ None
- ☐ Basic WMS
- ☐ Advanced WMS
- ☐ Custom WMS

### Current Warehouse Density (CBM/sqm)

Enter a number...

### Potential Automation Technologies to Investigate

- ☐ Automated Guided Vehicles (AGVs)
- ☐ Automated Storage and Retrieval Systems (AS/RS)
- ☐ Robotics (Picking, Packing)
- ☐ Conveyor Systems
- ☐ Warehouse Control System (WCS)
- ☐ Voice Picking

### Initial Assessment of Potential ROI for Automation

Write something...

### Estimated Automation Investment Budget (USD)

Enter a number...

### Target Date for Automation Implementation (if applicable)

Enter date...

## Cost Analysis & Budgeting

Analyze the costs associated with different capacity planning options, including construction, leasing, automation, and labor. Develop a budget for capacity upgrades.

**Estimated Cost of New Warehouse Construction (if applicable)**

Enter a number...

**Estimated Cost of Warehouse Lease Expansion (if applicable)**

Enter a number...

**Cost of New Racking Systems**

Enter a number...

**Cost of Warehouse Management System (WMS) Implementation (if applicable)**

Enter a number...

**Estimated Annual Labor Costs (Current & Projected)**

Enter a number...

**Cost of Automation Equipment (e.g., conveyors, sorters)**

Enter a number...

**Utility Costs (Current & Projected)**

Enter a number...

## Assumptions Underlying Cost Estimates

Write something...

## Location & Layout Considerations

Evaluate the suitability of warehouse location for accessibility, transportation costs, and labor availability. Optimize the internal layout for efficient flow.

### Current Dock Door Count

Enter a number...

### Desired Dock Door Count (Future)

Enter a number...

### Proximity to Major Transportation Routes

- ☐ Excellent
- ☐ Good
- ☐ Fair
- ☐ Poor

### Description of Current Warehouse Layout

Write something...

**Is the current layout conducive to efficient product flow?**

- ☐ Yes
- ☐ No
- ☐ Somewhat

**Average Travel Distance per Pick (estimated)**

Enter a number...

**Warehouse Location (GPS Coordinates)**

 [Set My Current Location](#)



**Notes on future layout changes**

Write something...

## Labor & Workforce Planning

Estimate labor requirements based on planned capacity and operational efficiency.  
Develop a workforce plan to support capacity needs.

**Current Warehouse Labor Capacity (Orders/Day)**

Enter a number...

**Projected Increase in Order Volume (Orders/Day)**

Enter a number...

**Estimated Labor Hours Required for Projected Volume**

Enter a number...

**Current Average Labor Cost Per Hour**

Enter a number...

**Number of Warehouse Associates Currently Employed**

Enter a number...

**Required Number of New Warehouse Associates**

Enter a number...

**Training Requirements for New Associates?**

- ☐ Yes, extensive training required
- ☐ Yes, minimal training required
- ☐ No, experienced hires

**Date New Hires are Expected to Join**

Enter date...