



WMS Warehouse Digital Transformation Roadmap Checklist 2026

Current State Assessment & Gap Analysis

Evaluate existing manual processes, legacy software limitations, and identification of operational bottlenecks in the current warehouse setup.

Existing Warehouse Workflow Description

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Identified Operational Bottlenecks

- ☐ Inventory Inaccuracy
- ☐ Slow Picking/Packing Speeds
- ☐ Lack of Real-time Visibility
- ☐ High Error Rates in Shipping
- ☐ Difficulty in Labor Management
- ☐ Inadequate Space Utilization

Current Tech Stack Maturity

- ☐ Manual/Paper-based
- ☐ Basic Spreadsheet Management
- ☐ Legacy Standalone Software
- ☐ Partially Integrated ERP/WMS

Current Annual Inventory Error Rate (%)

Enter a number...

Current Process Flowcharts/SOPs

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Last Warehouse Audit Date

Enter date...

Infrastructure & Hardware Readiness

Audit of physical infrastructure including Wi-Fi coverage, handheld scanner availability, IoT sensor deployment, and server/cloud stability.

Network Connectivity Status

- ☐ Stable & High-Speed
- ☐ Intermittent/Weak Coverage
- ☐ Requires Upgrade

Hardware Inventory Verification

- ☐ Handheld RF Scanners
- ☐ Mobile Label Printers
- ☐ Automated Sorters/Conveyors
- ☐ IoT Temperature/Humidity Sensors
- ☐ Desktop Workstations

Total Number of Scanning Devices Available

Enter a number...

Identified Wi-Fi Dead Zones

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Last Hardware Maintenance Audit Date

Enter date...

Network Topology Map / Site Blueprint

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IT Infrastructure Manager Approval

Data Migration & Integration Strategy

Planning for clean data extraction from legacy systems, mapping data fields, and establishing API connectivity with ERP and TMS providers.

Legacy System Source Name

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Data Migration Cutover Date

Enter date...

Data Entities to be Migrated

- ☐ SKU Master Data
- ☐ Vendor Information
- ☐ Inventory On-Hand Balances
- ☐ Active Purchase Orders
- ☐ Customer Master Data
- ☐ Warehouse Bin/Location Hierarchy

Integration Method

- ☐ API (REST/SOAP)
- ☐ EDI (Electronic Data Interchange)
- ☐ Flat File (CSV/XML) via FTP
- ☐ Direct Database Connection

Data Cleansing Requirements

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Data Mapping Document

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Process Automation & Robotics Integration

Defining requirements for automated guided vehicles (AGVs), automated storage and retrieval systems (AS/RS), and automated sorting conveyors.

Planned Automation Technologies

- ☐ Automated Guided Vehicles (AGVs)
- ☐ Autonomous Mobile Robots (AMRs)
- ☐ Automated Storage and Retrieval Systems (AS/RS)
- ☐ Automated Sorting Systems
- ☐ Automated Dimensioning & Weighing
- ☐ Cobots (Collaborative Robots)

Automation Integration Requirements

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Robotics Installation Deadline

Estimated Annual ROI Percentage

Automation Vendor Technical Specifications

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Integration Complexity Level

- ☐ Low (Plug & Play)
- ☐ Medium (Requires Middleware)
- ☐ High (Deep WMS Customization Required)

Software Configuration & Customization

Defining WMS functional requirements, custom workflow rules, dashboard development, and warehouse-specific logic configuration.

Custom Workflow Rule Name

Enabled WMS Modules

- ☐ Inventory Management
- ☐ Inbound Receiving
- ☐ Outbound Shipping
- ☐ Quality Control
- ☐ Cycle Counting

Custom Logic Configuration Details

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Configuration Completion Date

Enter date...

Configuration Documentation

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Lead Developer/Consultant Approval

User Training & Change Management

Development of SOPs, staff training schedules, super-user identification, and communication plans to ensure high adoption rates.

Target User Groups for Training

- ☐ Warehouse Floor Staff
- ☐ Inventory Managers
- ☐ Super Users / IT Admins
- ☐ Logistics Coordinators
- ☐ Shift Supervisors

Training Session Completion Date

Enter date...

Training Material Version/ID

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Training Delivery Method

- ☐ In-Person Workshop
- ☐ E-Learning Module
- ☐ On-the-Job Shadowing
- ☐ Video Tutorial

Change Management Feedback & Observations

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Training Lead Authorization

Testing & User Acceptance Testing (UAT)

Execution of end-to-end scenario testing, edge-case validation, and final sign-off on system accuracy and performance.

Test Scenarios Completed

- ☐ Inbound Receiving Tests
- ☐ Putaway & Bin Assignment Tests
- ☐ Picking & Packing Accuracy Tests
- ☐ Inventory Adjustment & Cycle Count Tests
- ☐ Outbound Shipping & Manifesting Tests
- ☐ Returns/Reverse Logistics Tests

UAT Pass/Fail Status

- ☐ Passed
- ☐ Passed with Minor Issues
- ☐ Failed - Critical Bug Identified

Bug Reports & Discrepancy Details

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UAT Completion Date

Enter date...

Lead Tester Approval Signature

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UAT Test Log/Evidence Upload

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Deployment & Go-Live Execution

Go-Live Scheduled Date

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Deployment Phase

- ☐ Pilot Program
- ☐ Phased Rollout
- ☐ Full Site Cutover

Pre-Launch Verification Tasks Completed

- ☐ Data Migration Verified
- ☐ Hardware Installed & Tested
- ☐ Staff Training Completed
- ☐ Backup Systems Ready

Rollback Contingency Plan Summary

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Project Manager Approval

Post-Implementation Audit & Optimization

Monitoring KPIs, measuring ROI against original objectives, and identifying iterative improvements for continuous warehouse excellence.

Audit Completion Date

Enter date...

Post-Implementation Error Rate (%)

Enter a number...

System Performance Rating

- ☐ Excellent
- ☐ Satisfactory
- ☐ Needs Improvement
- ☐ Critical Failure

Identified Optimization Opportunities

- ☐ Hardware Upgrades
- ☐ Software Configuration Tweaks
- ☐ Staff Re-training
- ☐ Network/Connectivity Fixes
- ☐ Process/SOP Refinement

Summary of Performance Gaps

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Detailed Audit Report Document

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Warehouse Manager Approval

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 **Generate Sample Report**