Materials Handling

SOFTWARE TECHNOLOGY USAGE STUDY

CONDUCTED BY:

PRG PEERLESS RESEARCH GROUP

MODERN MATERIALS HANDLING

April 2017
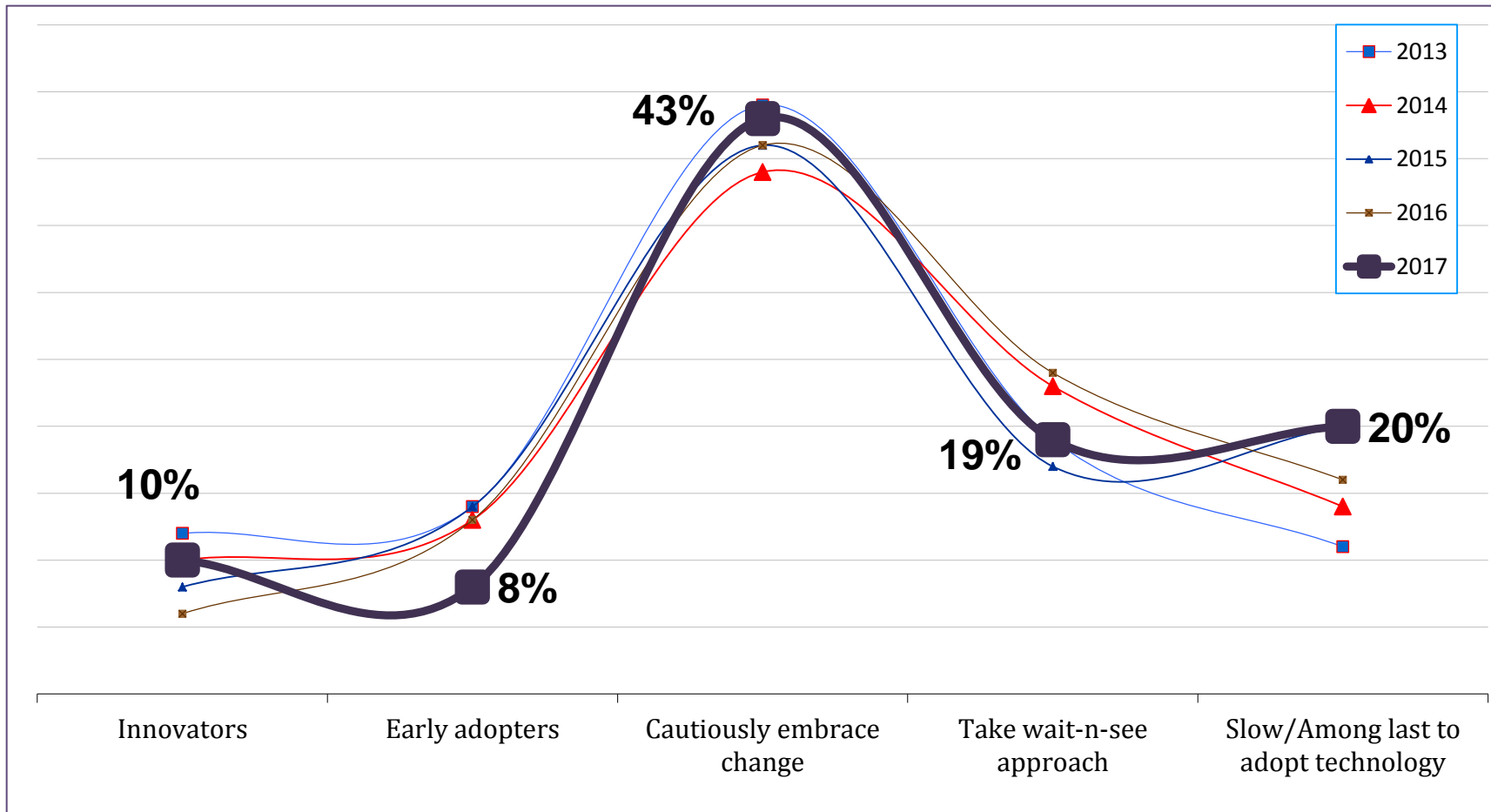
Introduction and Methodology

Methodology:

- Field: March/April, 2017

- Method: Internet by email invitation

- Sample: Subscribers to *Modern Materials Handling* magazine

- Qualifications: Personally involved in using, evaluating, or purchasing software for their company's materials handling operations

- Incentive: Raffle for a $100 amazon.com e-card

- Response: Response to waves 2013 through 2017 follows:

Field Dates	2017	2016	2015	2014	2013
# of completes	213	109	192	134	405
Margin of error at @ 95% confidence level	+/-6.9%	+/-9.7%	+/- 7.4 %	+/- 9.0	+/- 5.0%

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How would you best describe your company's adoption of technology for your materials handling procedures?

Legend:
- 2013
- 2014
- 2015
- 2016
- 2017

Data labels (2017): Innovators 10%, Early adopters 8%, Cautiously embrace change 43%, Take wait-n-see approach 19%, Slow/Among last to adopt technology 20%

X-axis categories: Innovators | Early adopters | Cautiously embrace change | Take wait-n-see approach | Slow/Among last to adopt technology

During the last two years what issue, challenge or problem have you looked to solve/address through the implementation of a materials handling management software application in your warehouse or distribution operation?

Accelerated ecommerce order fulfillment.
Achieving improved accuracy & efficiency simultaneously
Aging technology is costly to modify to try new concepts
Antique EVO ERP System.
Auto-bagging
Automated, quick opening dock doors
Automating processes
Backup software
Barcode and scanning technology and truck mount hardware.
Barcoding of equipment
Best practice of storage, generation of location information in detail. We are currently adapting our 3PL's software for our use.
better and more timely replenishment, additional methods for allocating and picking customer orders
Better flow of product
Better inventory control, lot tracking, multi-warehouse fulfillment
Better real-time integration across platforms
BOL tracking
Capital and resources
Communication between the in house software and implementation of new software. End user training.
communications and security
Consistency between our WMS and ERP systems.
Consolidation of system instances.
Consumption of raw materials for production using AX Dynamics.
Cost
Cost per unit reduction
Data review in reporting
Deciding on which of the many methods/technologies is best suited for our needs.
Distribution analysis
Dull, dirty, dangerous jobs

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During the last two years what issue, challenge or problem have you looked to solve/address through the implementation of a materials handling management software application in your warehouse or distribution operation? *(continued)*

E-Commerce parcel shipping automation - Combining pick and put-to-light systems, scanning, dimensioning, weighing, conveying, Print & apply technologies into integrated turn key solutions)

Effective FIFO and inventory control, more efficient productivity monitoring.

Efficiency

Efficiency, increase profitability and shorten production times.

Enabling bar code scanning

Equipment Upgrades

Food Safety Inspection Documentation

Ergonomic issues relating to our aging workforce

Ergonomics related to movement of boxes and pallets.

ERP upgrade rolling. Aiming for a unified platform instead of several different ERP's.

Fabrication planning and scheduling

Finding the right solution for our needs,

Finished Goods Inventory

Fleet management

Fleet management

For our Sales staff we have adopted a GPS tracking system that now allows our business development staff upload leads directly to our customer relationship management system based on the GPS coordinates from the visit to the customers site location. This has greatly improved productivity of the sales team &management can see in real time

General warehouse operations improvements.

Getting more business

Getting the mobile software to work at a speed worth using the technology.

Handling and processing efficiency to reduce labor and streamline processing.

Hiring good , reliable workers, careful screening

How to do velocity slotting

Implement productivity tracking systems for a benchmark and increase productivity.

Implementation of Mercury Gate TMS

Implemented a safety protocol, reconfigured warehouse.

Implementing a barcode system to expedite picking and placing parts in the stockroom.

Increasing warehouse capacity

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During the last two years what issue, challenge or problem have you looked to solve/address through the implementation of a materials handling management software application in your warehouse or distribution operation? *(continued)*

Increasing warehouse capacity
Integration of multiple technologies in multiple locations across the globe.
Internal IT Support
Inventory accuracy through RFID applications
Inventory accuracy, efficient administration.
Inventory discrepancies
INVENTORY PROBLEMS
Inventory stocking to use point movement and tracking
Inventory transaction efficiency improvements is probably the biggest issue we've been looking at.
IT technology
KPI performance
Labeling error proofing
Labor reduction and throughput
Lead time and quality
Life Cycle management
Lifting and spray painting 100 pound parts
Logging and tracking incoming shipments
Logistics and shipping
Lowering costs
Maintenance management and reliability
Manual receiving and putaway to WMS
Many issues like changing from ERP system to SAP
Materials tracking in a warehouse
Mechanical way to handle product harvested from plate freezers
Mobility, identification of returned materials
Move to pick and pass conveying system.
New equipment justification.
New WM software packages are hard to mod and don't come stock with features that are needed for a 3PL
Newer technologies that are available including new platforms for these applications.

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During the last two years what issue, challenge or problem have you looked to solve/address through the implementation of a materials handling management software application in your warehouse or distribution operation? *(continued)*

Not everyone understanding change.
OEM support is not quick enough and is to costly for both support and upgrades. We have implemented our own WMS where we can control upgrades and enhancements.
Only been here four months
Optimize capacity, lower operating costs and reduce downtime
Pick and put away issues
Picking efficiency
Powered industrial equipment tracking software/devices
Printing of bar code label from receipt and sale
Product movement.
Product tracking into loads
Productivity and accuracy
productivity changes in new software/hardware
Purchasing shrink-wrap robots to replace difficult and slow method of manually shrink-wrapping hundreds of pallets per day
Raw material storage and tracking
Receiving Goods and E-Commerce
Reducing expired material at our ware house.
Reliability
Reliability of the new technology scanner failures
RFID
Robotics
ROI has to be there quickly or our small volume will not justify.
SAP Across Company.
Scanning accuracy
Securement practices and materials used for securement have been evaluated to determine best protection of cargo and practicality
Sending small quantity items to a customer in individual packages and using a marker to write the part numbers on the clear plastic bag // this was resolved by utilizing a hip printer connected to our scanner via wireless to be able to print bar code labels to apply to these on the fly.
Several issues the prior management staff had faced before we got here, including moving, storing and tracking materials.
Shelving to save space and to be more efficient.

During the last two years what issue, challenge or problem have you looked to solve/address through the implementation of a materials handling management software application in your warehouse or distribution operation? *(continued)*

Software for efficiency
Software integration with all systems
Speed, cost
Staging
Staging of orders, shortening pick times
Storage and retrieval of Frozen Materials. Tracking out time of materials
Supply chain issues stemming from production to final delivery before consumer displays.
Systems plugging
The ability to improve our forecasting capability and to comply with SSCC-18 pallet tag requirements.
Time
TMS, warehouse space consolidation, picking efficiency.
Too much inventory
Tracking incoming packages when delivered throughout our facility.
Training. Costs. Getting right products. Attacks on info.
Updates to our WMS are challenging.
UPDATING CURRENT SOFTWARE
Verification if inbound receipts.
Warehouse management operations
Warehouse management system
Warehouse space and traceability
We added robotic automation for our packing applications
We are a material handling integrator. We have run into situations where a customer demands a more sophisticated tracking of there inventory, but they have either very simple or no WMS software.
We had to up grade our software to track product from our plant to the customers warehouse.
We have implemented a new automated shrink wrap solution to help capture weights and dims for the customer. We are testing visual picking assist glasses to replace paper/RF picking.
We have looked at Goods to Person automation to try and improve thru put in the warehouse. We have also looked at upgrading our WMS software.

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During the last two years what issue, challenge or problem have you looked to solve/address through the implementation of a materials handling management software application in your warehouse or distribution operation? *(continued)*

| |
|---|
| We have many conveying system to move Bulk Products. This is always a challenge due to the nature of our business. We process Millions of gallons per day of raw wastewater and the plant was built 70s (Some of it in 1950. We are retrofitting a lot of modern automation. |
| We have recently implemented barcode scanning and warehouse management system built into our ERP system to resolve inventory accuracy issues. |
| We have several DC's in several provinces (largest is 85,000sq ft.)   Transfer orders to our branches from the DC's are not well coordinated |
| We transitioned from a 4 distribution center model to a hub and spoke model and opened a master distribution facility to support the now regional distribution centers. The magnitude of this transition has been a bit more than expected. |
| We've looked into designing a zone system for stock products and raw material. |
| Wireless connection issues in a large warehouse |
| WMS integration |
| Yard management |

How has your company's use of materials handling software changed over the past 2 years?
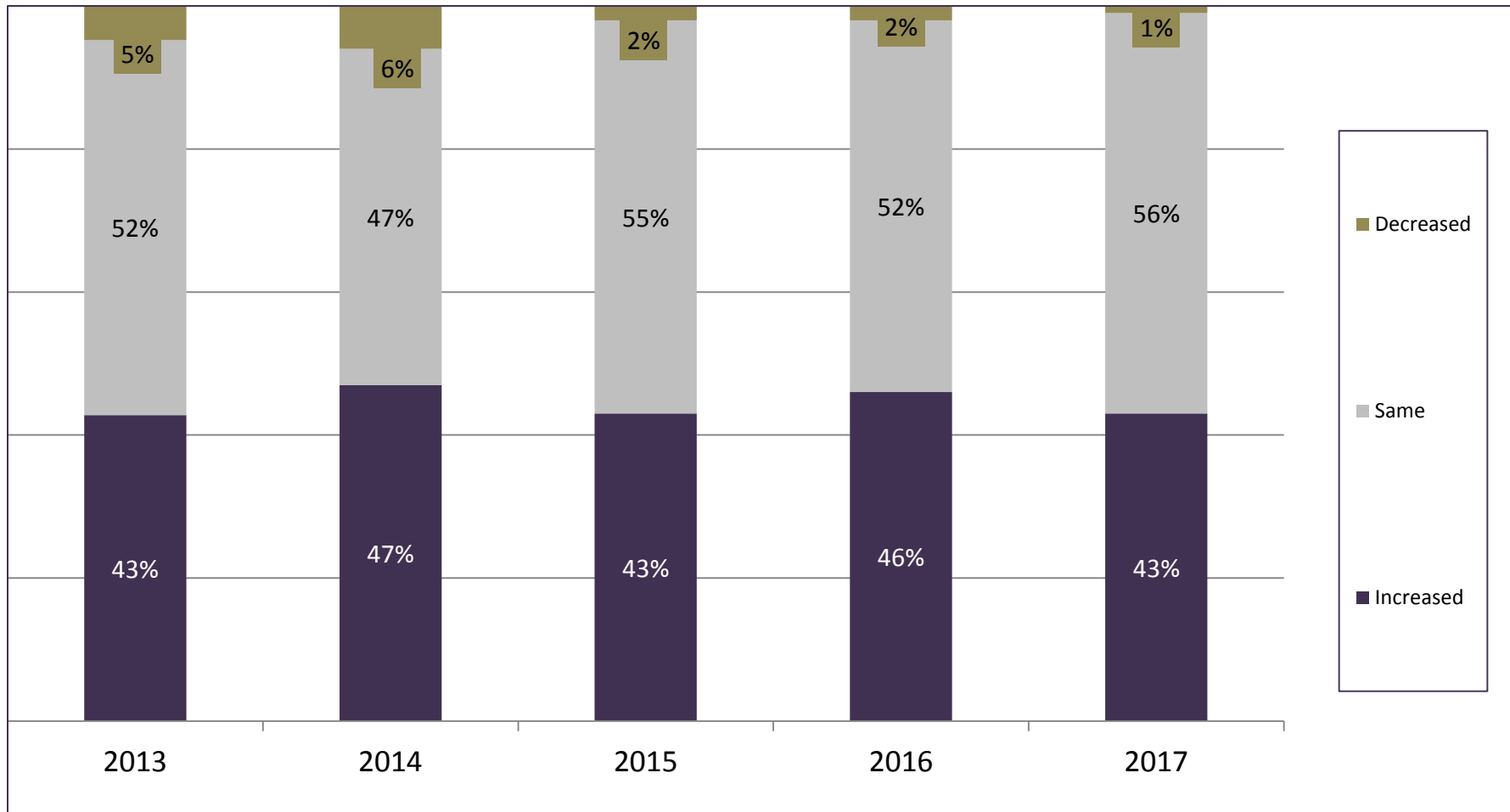
Which of the following software applications are currently in use in your warehousing and distribution environment?

2016 vs. 2017

Software	2016	2017
Warehouse Management software (WMS, Inventory management, etc.)	61%	56%
Transportation Management software (TMS)	29%	32%
Asset tracking software	NA	28%
Supply chain management and planning (SCP) software (such as Supply Chain Planning, demand planning, etc.)	28%	28%
Labor Management Software (LMS, Workforce Management software)	28%	26%
Warehouse Control Systems (WCS)	25%	22%
Slotting software	14%	10%
Yard Management Systems (YMS)	8%	8%
Other	4%	11%
None of these	17%	10%

Which are you planning to evaluate, purchase or upgrade within the next 24 months?

2016 vs. 2017

Category	2016	2017
Warehouse Management software (WMS, Inventory management, etc.)	38%	34%
Warehouse Control Systems (WCS)	24%	21%
Asset Tracking	NA	19%
Labor Management Software (LMS, Workforce Management software)	11%	18%
Transportation Management software (TMS)	12%	16%
Supply chain management and planning (SCP) software (such as Supply Chain Planning, demand planning, etc.)	17%	15%
Slotting software	9%	13%
Yard Management Systems (YMS)	6%	8%
Other	2%	9%
None of these	25%	22%

Legend: ■ 2016 ■ 2017

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About organizations' WMS

How long have you had your current WMS application in place?
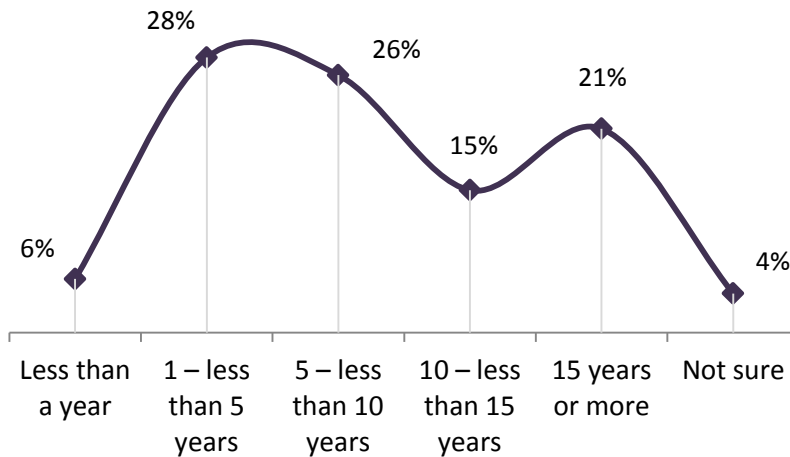
- Less than a year: 6%
- 1 – less than 5 years: 28%
- 5 – less than 10 years: 26%
- 10 – less than 15 years: 15%
- 15 years or more: 21%
- Not sure: 4%

And, when did you last upgrade this application?

- Less than a year: 17%
- 1 – less than 5 years: 37%
- 5 – less than 10 years: 17%
- 10 – less than 15 years: 5%
- 15 years or more: 1%
- Not sure: 9%
- We haven't upgraded: 14%

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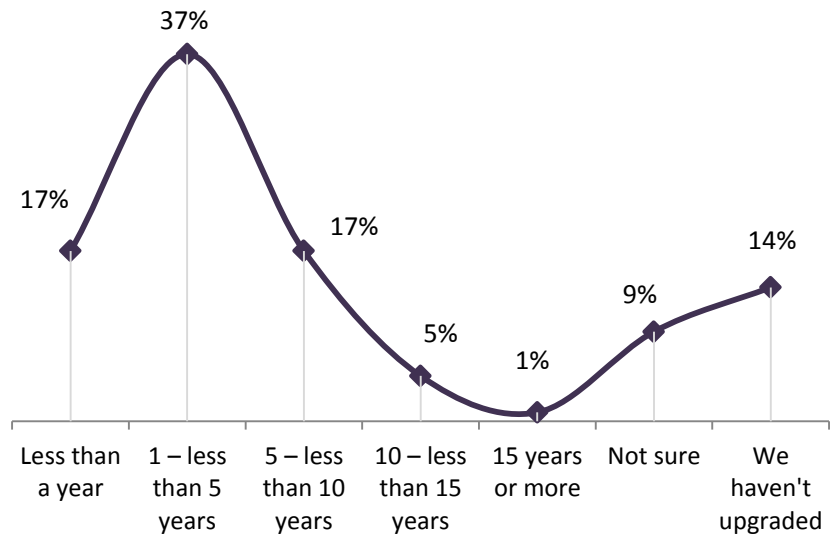
How long did it take for you to realize your return on your WMS investment?
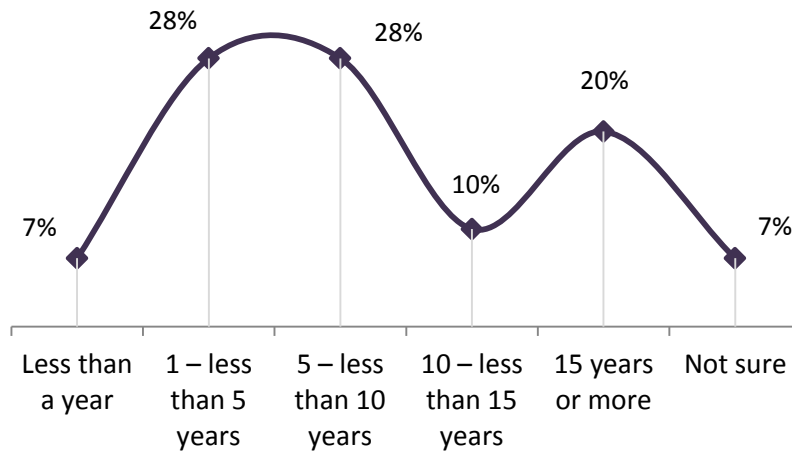
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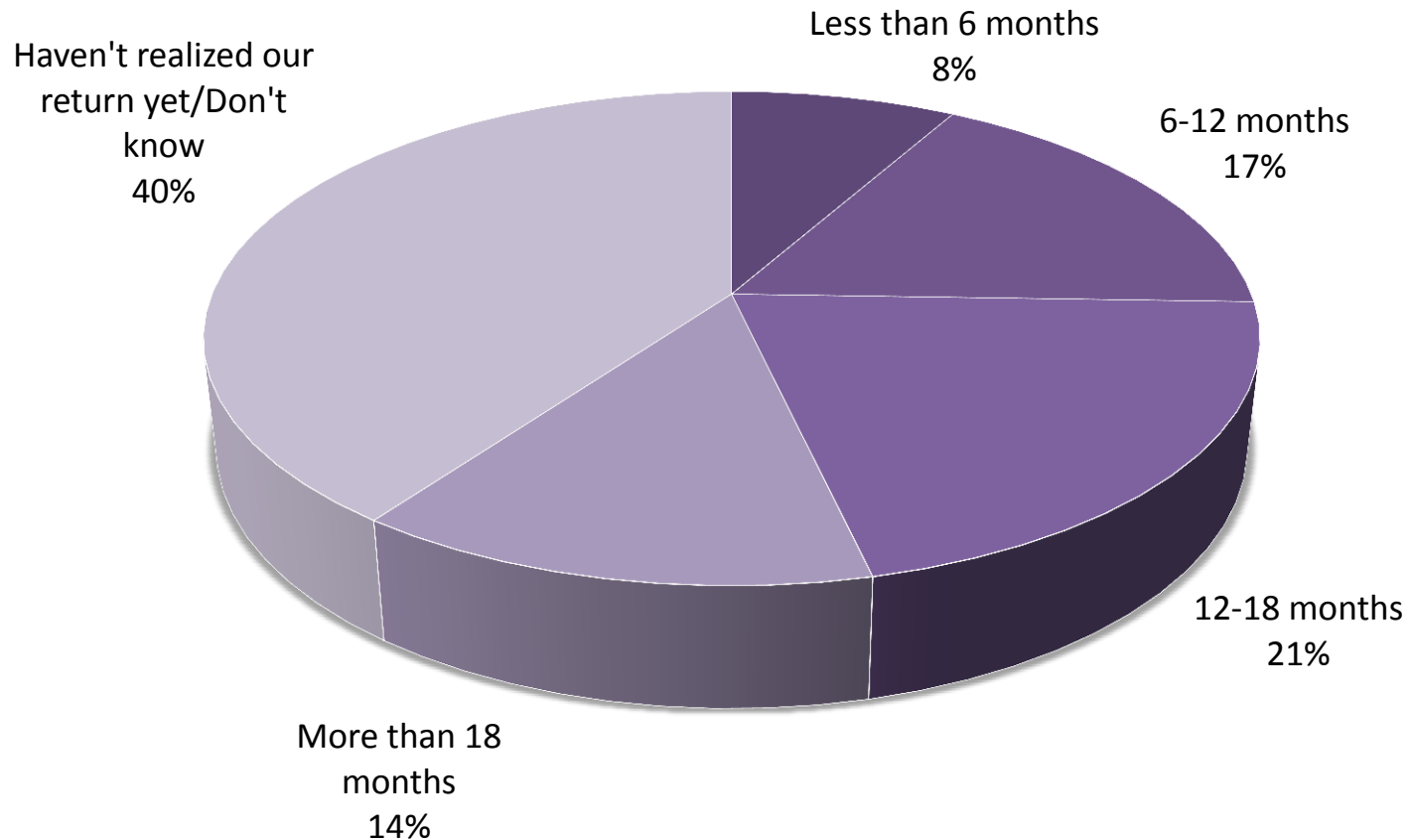
What are the main reasons your company is planning to consider or buy warehousing management software (WMS) during the next 2 years?

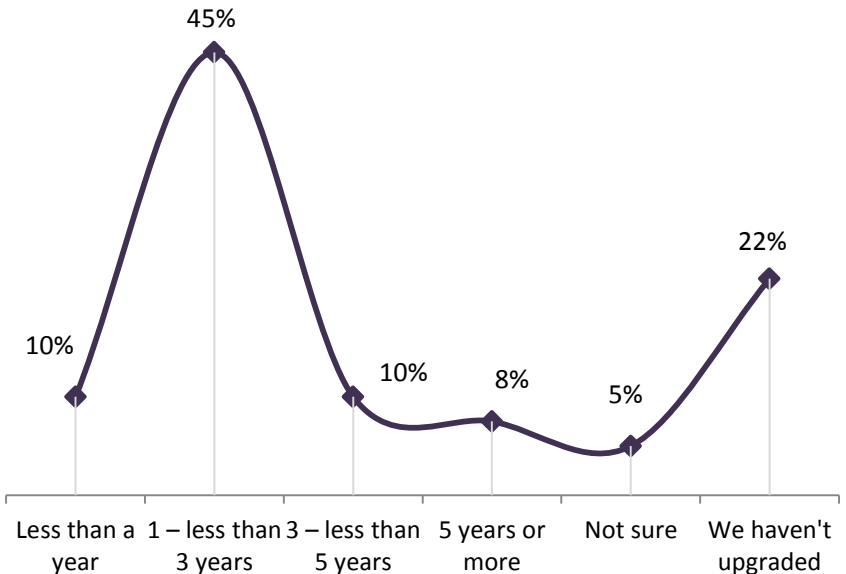| Category	Percentage
Upgrade of existing package	54%
Real-Time Control	30%
Labor Management	29%
Inventory Deployment	22%
Slotting	14%
Yard Management	9%
Other	18%
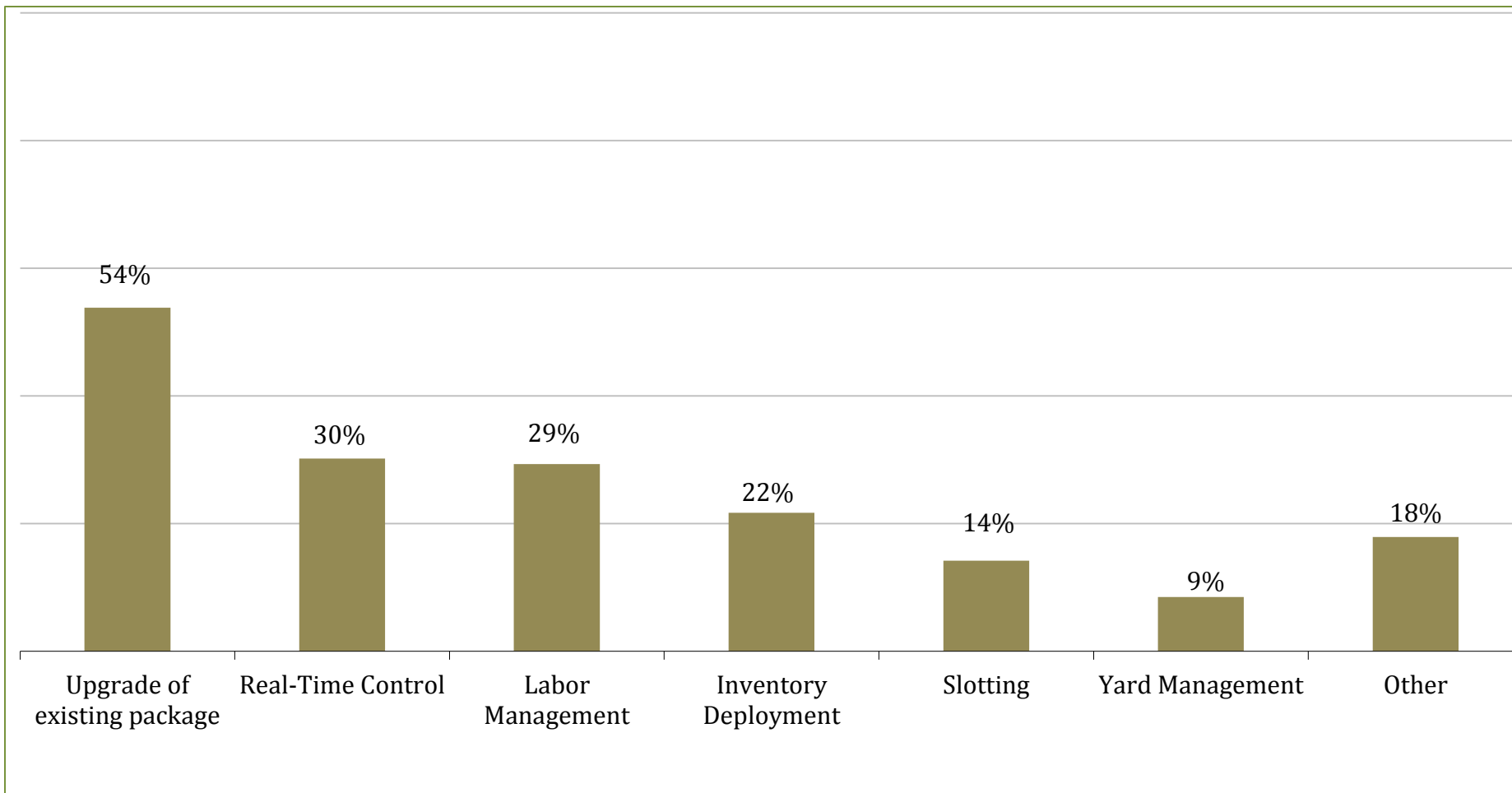
About organizations' WCS

How long have you had your current WCS in place?

- Less than a year: 7%
- 1 – less than 5 years: 28%
- 5 – less than 10 years: 28%
- 10 – less than 15 years: 10%
- 15 years or more: 20%
- Not sure: 7%

And, when did you last upgrade this application?

- Less than a year: 10%
- 1 – less than 3 years: 45%
- 3 – less than 5 years: 10%
- 5 years or more: 8%
- Not sure: 5%
- We haven't upgraded: 22%

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How long did it take for you to realize your return on your WCS?

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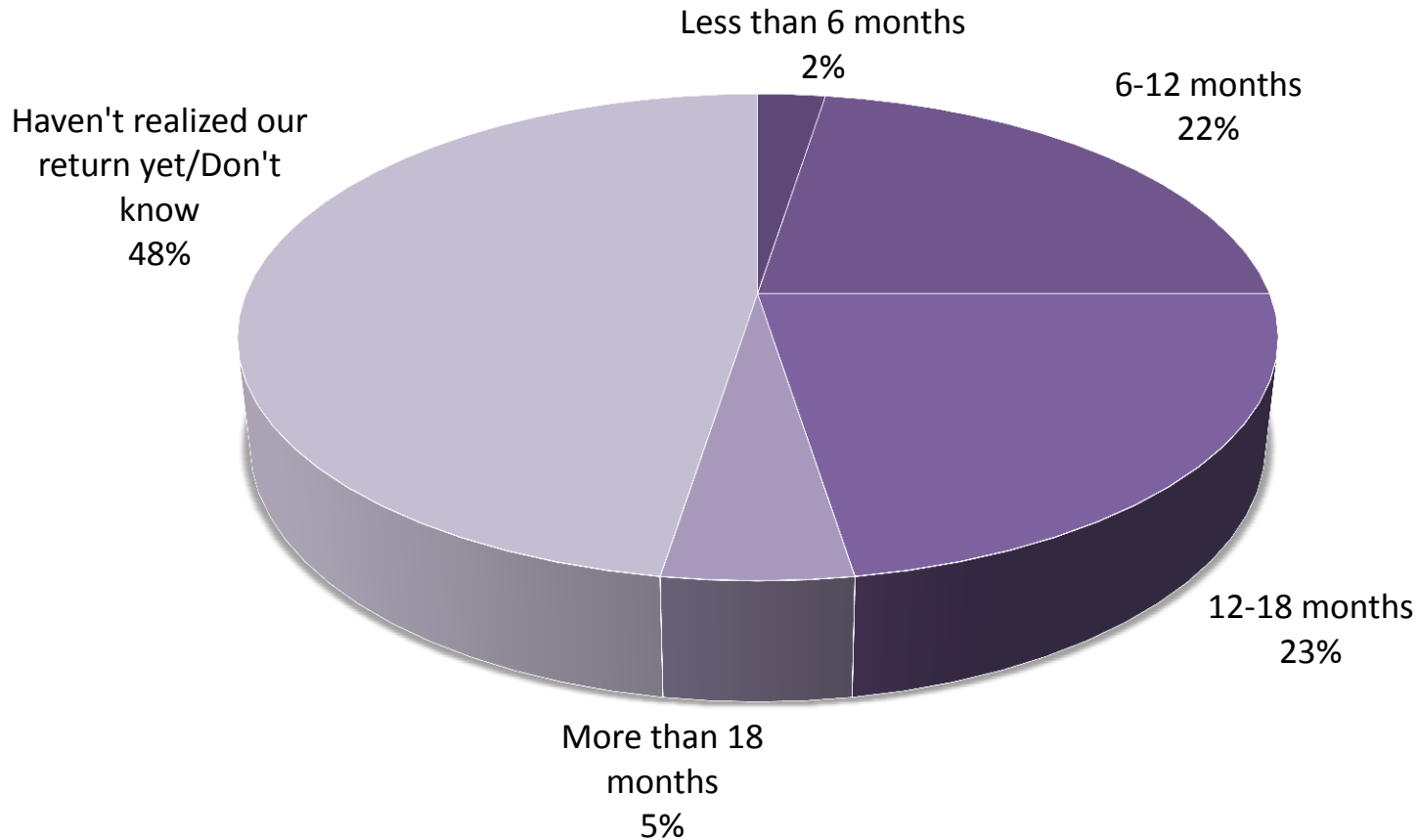
About organizations' TMS

How long have you had your current TMS application in place?
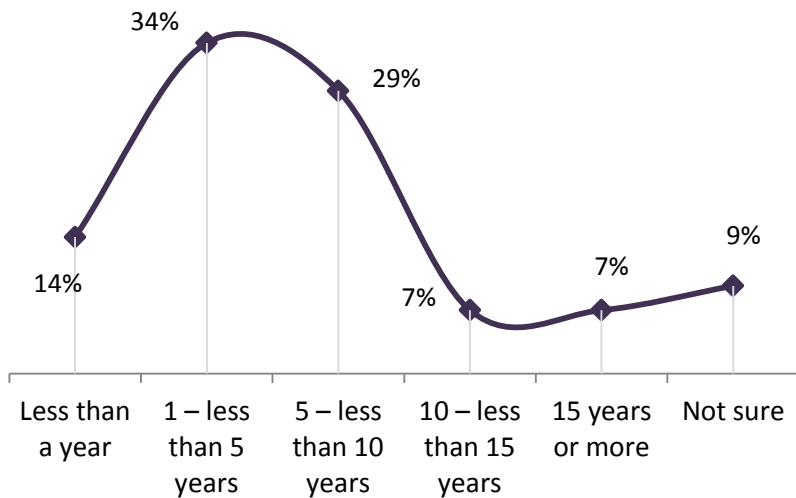
- Less than a year: 14%
- 1 – less than 5 years: 34%
- 5 – less than 10 years: 29%
- 10 – less than 15 years: 7%
- 15 years or more: 7%
- Not sure: 9%

And, when did you last upgrade this application?

- Less than a year: 20%
- 1 – less than 5 years: 36%
- 5 – less than 10 years: 13%
- 10 – less than 15 years: 3%
- 15 years or more: 0%
- Not sure: 18%
- We haven't upgraded: 10%
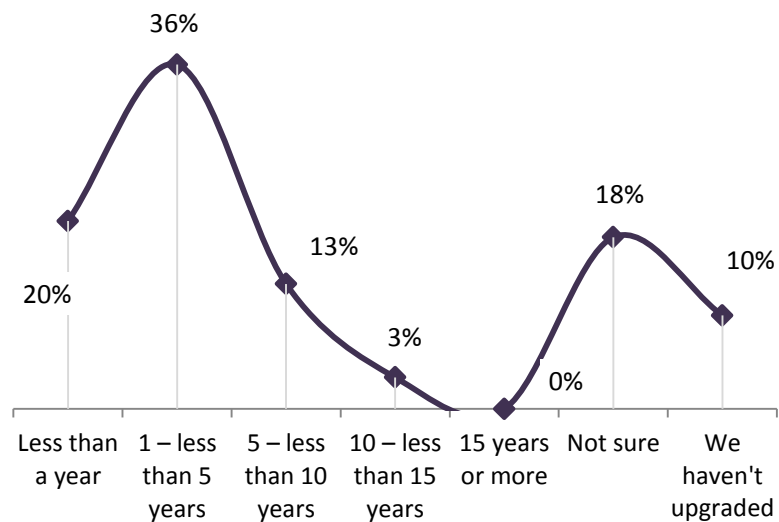
How long did it take for you to realize your return on your TMS investment?

Less than 6 months
11%

6-12 months
25%

12-18 months
7%

More than 18 months
11%

Haven't realized our return yet/Don't know
46%

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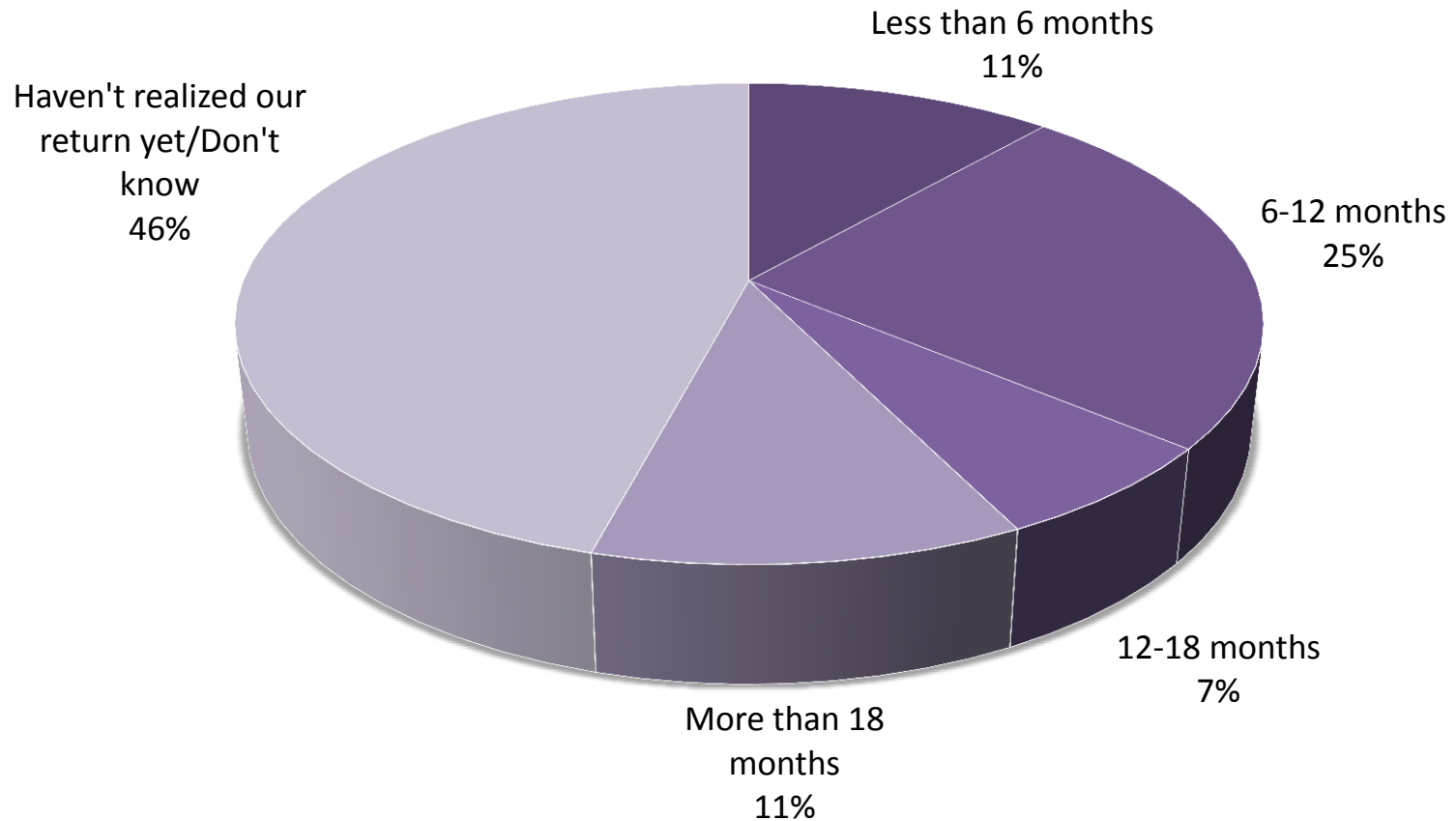
About organization's Supply Chain Management and Planning (SCP)

How long have you had your current SCP application in place?
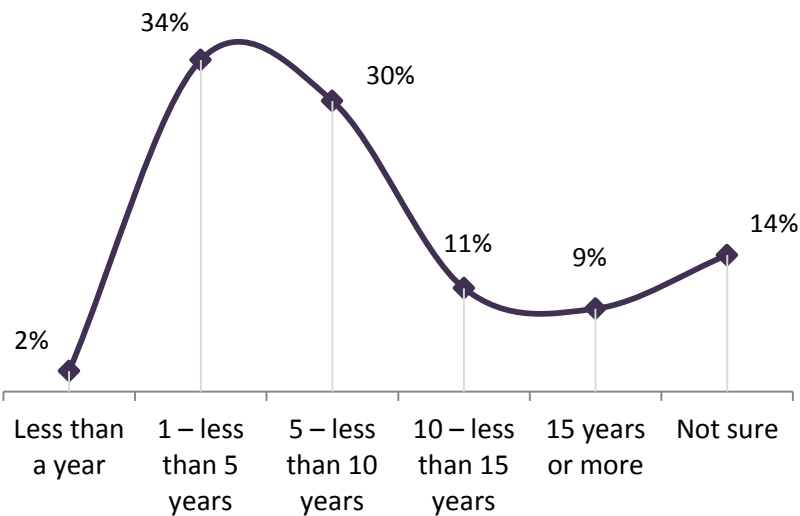
- Less than a year: 2%
- 1 – less than 5 years: 34%
- 5 – less than 10 years: 30%
- 10 – less than 15 years: 11%
- 15 years or more: 9%
- Not sure: 14%

And, when did you last upgrade this application?

- Less than a year: 15%
- 1 – less than 5 years: 38%
- 5 – less than 10 years: 15%
- 10 – less than 15 years: 6%
- 15 years or more: 0%
- Not sure: 17%
- We haven't upgraded: 9%
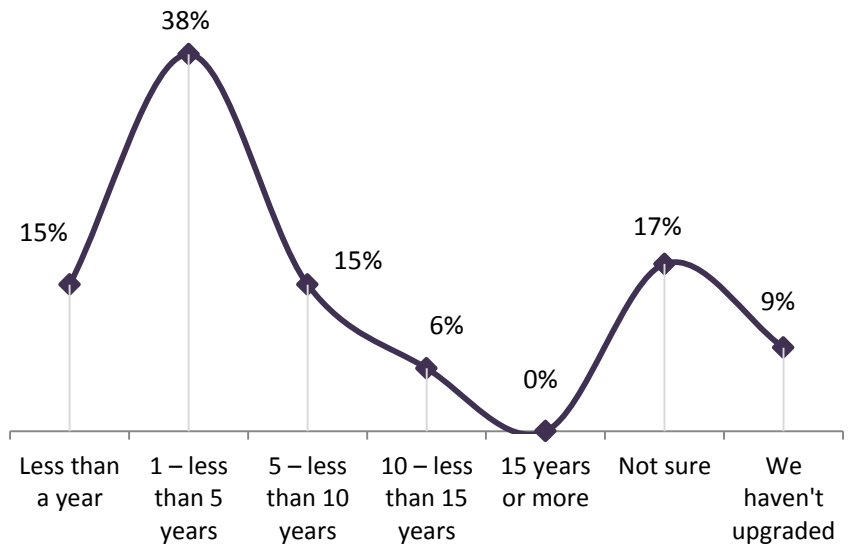
How long did it take for you to realize your return on your SCP application?

Less than 6 months
6%

6-12 months
15%

12-18 months
19%

More than 18 months
12%

Haven't realized our return yet/Don't know
48%

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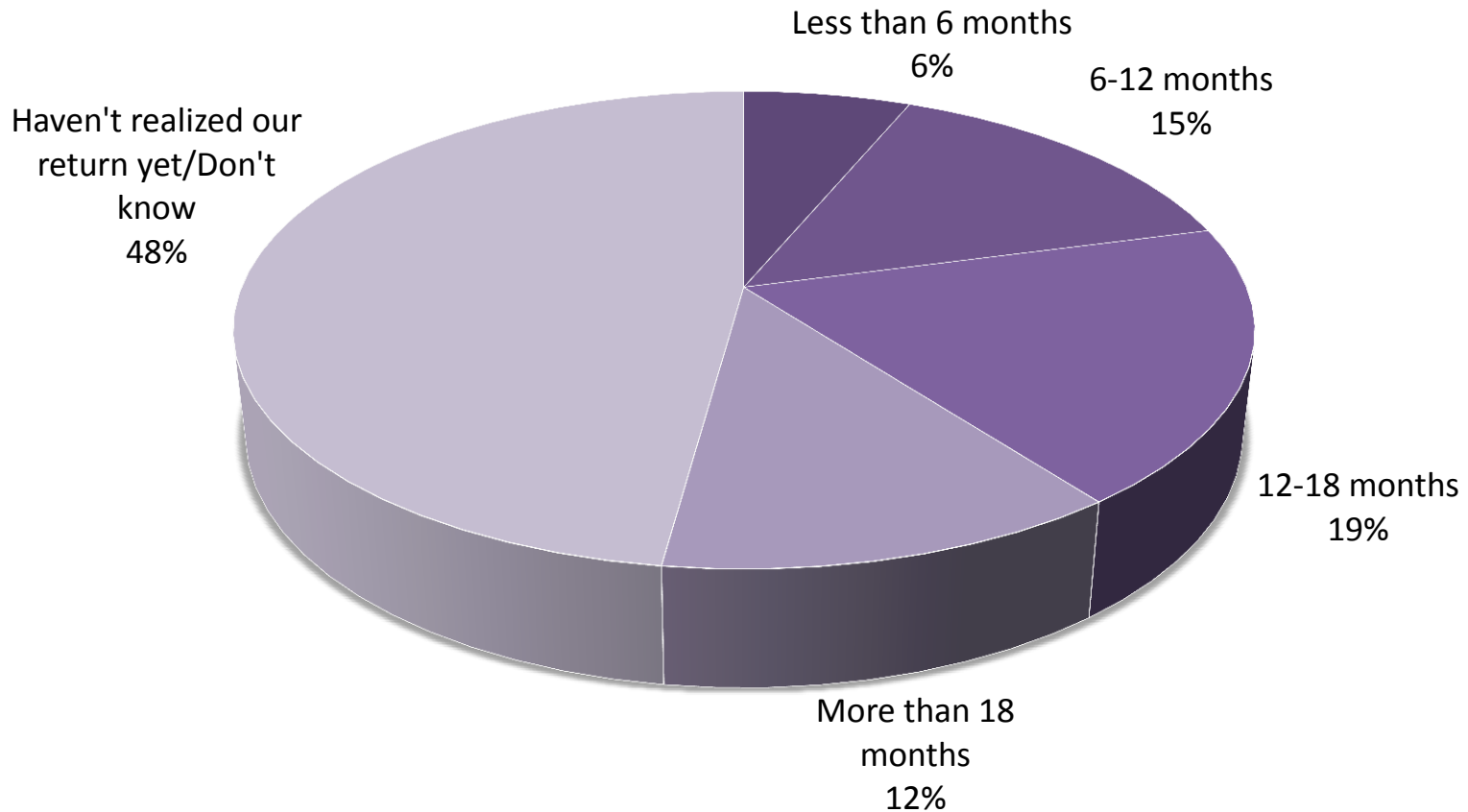
For which initiatives is your company using your supply chain management software application?

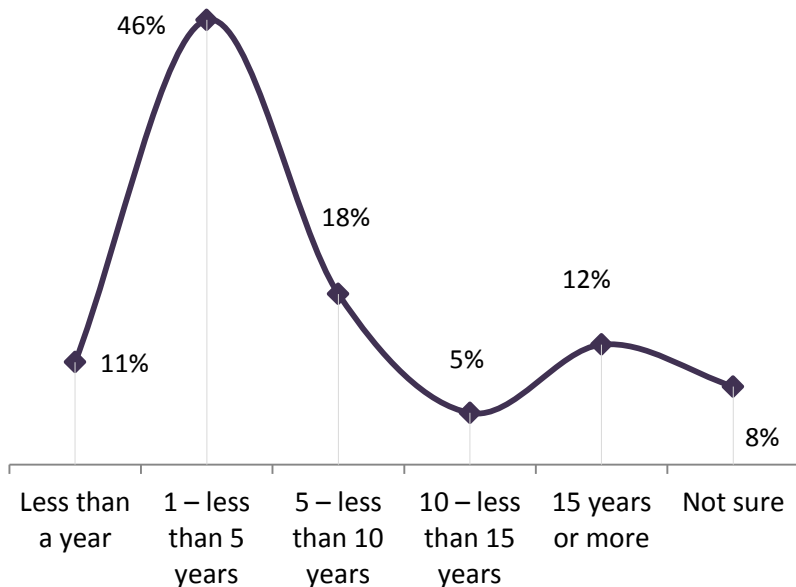| Initiative	Percentage
Inventory Visibility	72%
Procurement	64%
Order Management	62%
Demand Planning	60%
Manufacturing	53%
Collaborative Forecasting, Planning and Replenishment (CFPR)	45%
Collaboration with Vendor/suppliers	38%
CRM	28%
Upgrade of existing package	28%
RFID Integration	17%
Event Management	13%
Other	6%

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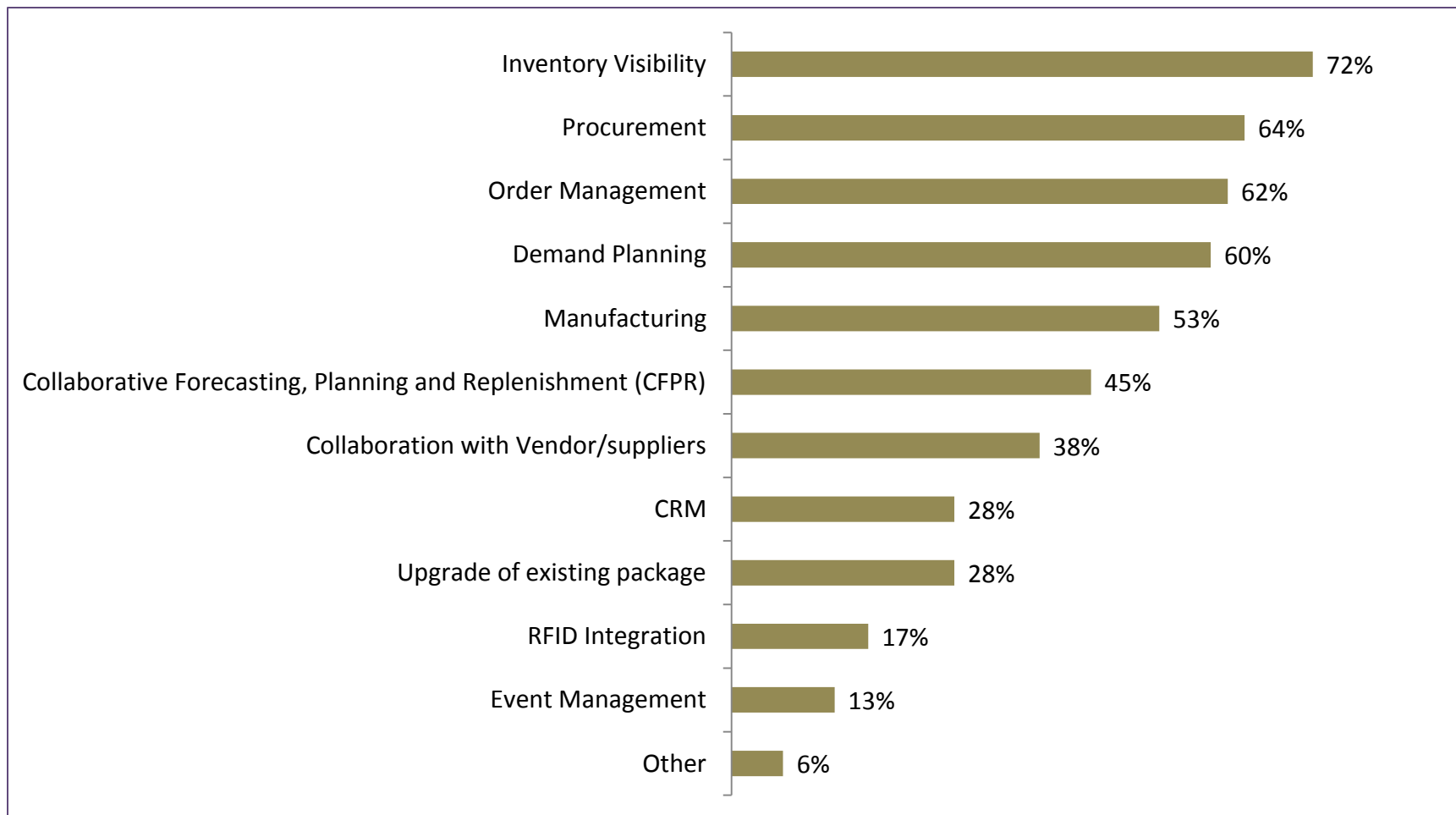
For which initiatives is your company planning to buy or upgrade your supply chain management software application?

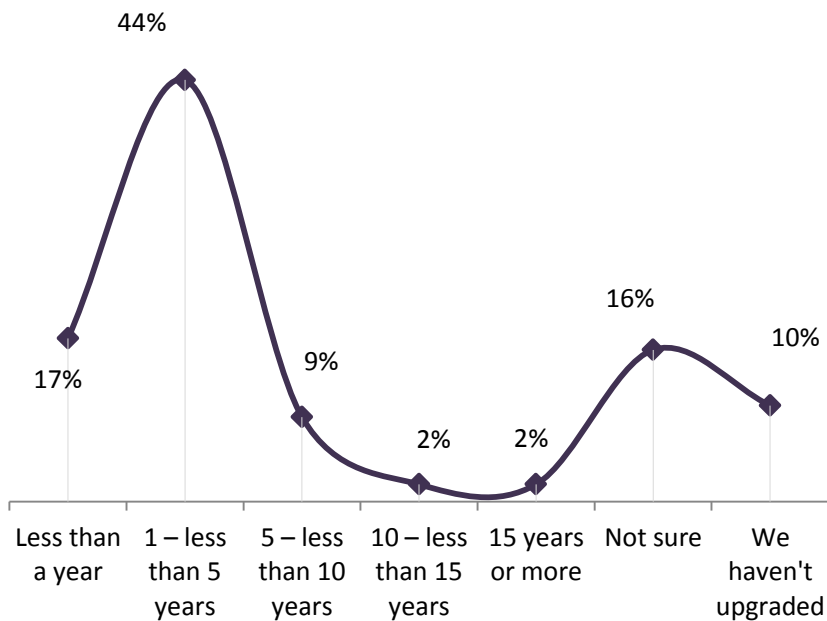| Initiative	Percentage
Inventory Visibility	56%
Demand Planning	53%
Manufacturing	47%
Procurement	42%
Order Management	42%
Collaborative Forecasting, Planning and Replenishment (CFPR)	42%
Upgrade of existing package	40%
Collaboration with Vendor/suppliers	38%
RFID Integration	18%
CRM	13%
Event Management	7%
Other	4%
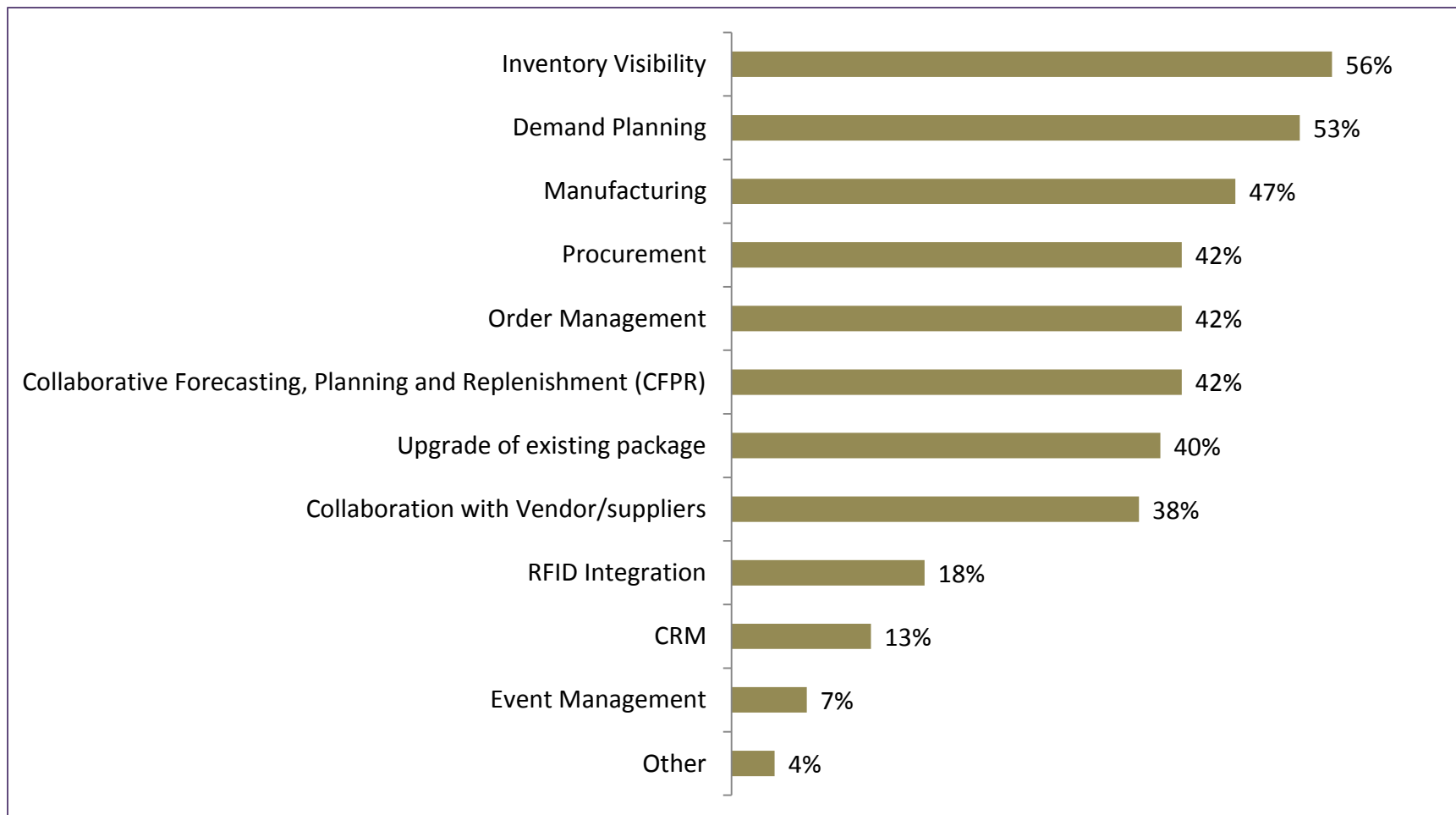
About organizations' Asset Management Solution

How long have you had your current asset tracking application in place?

- Less than a year: 11%
- 1 – less than 5 years: 46%
- 5 – less than 10 years: 18%
- 10 – less than 15 years: 5%
- 15 years or more: 12%
- Not sure: 8%

And, when did you last upgrade this application?

- Less than a year: 17%
- 1 – less than 5 years: 44%
- 5 – less than 10 years: 9%
- 10 – less than 15 years: 2%
- 15 years or more: 2%
- Not sure: 16%
- We haven't upgraded: 10%
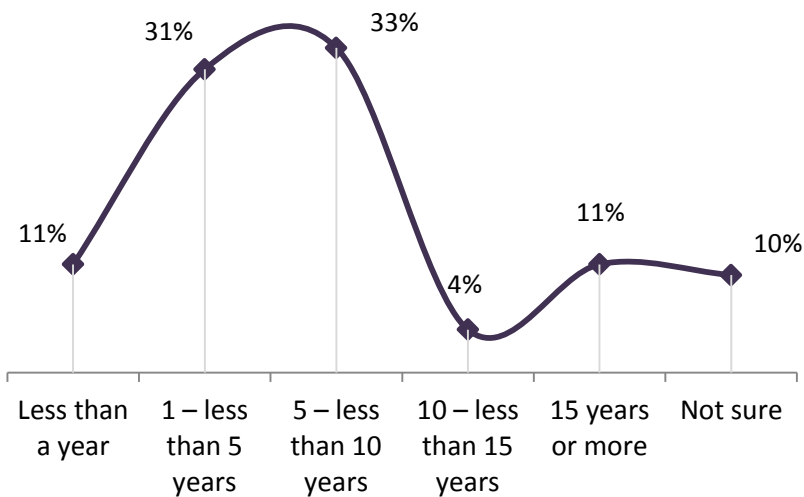
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How long did it take for you to realize your return on your asset management investment?
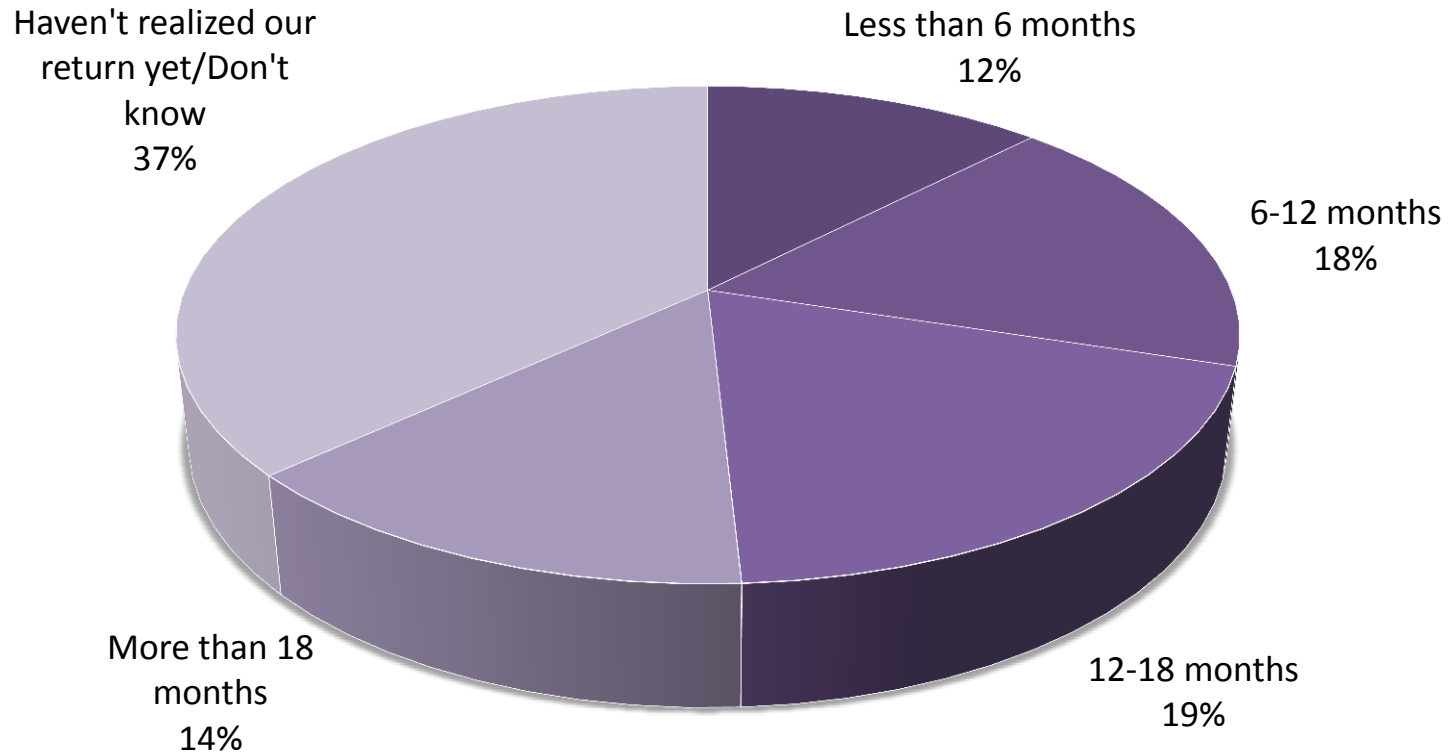
About organizations' LMS

How long have you had your current LMS in place?
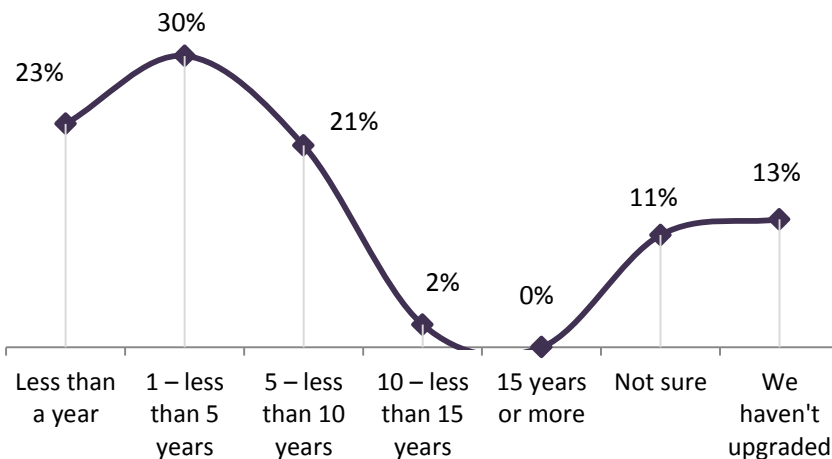
- Less than a year: 11%
- 1 – less than 5 years: 31%
- 5 – less than 10 years: 33%
- 10 – less than 15 years: 4%
- 15 years or more: 11%
- Not sure: 10%

And, when did you last upgrade this application?

- Less than a year: 23%
- 1 – less than 5 years: 30%
- 5 – less than 10 years: 21%
- 10 – less than 15 years: 2%
- 15 years or more: 0%
- Not sure: 11%
- We haven't upgraded: 13%

How long did it take for you to realize your return on your LMS?

Less than 6 months
9%

6-12 months
13%

Haven't realized our return yet/Don't know
42%

12-18 months
25%

More than 18 months
11%

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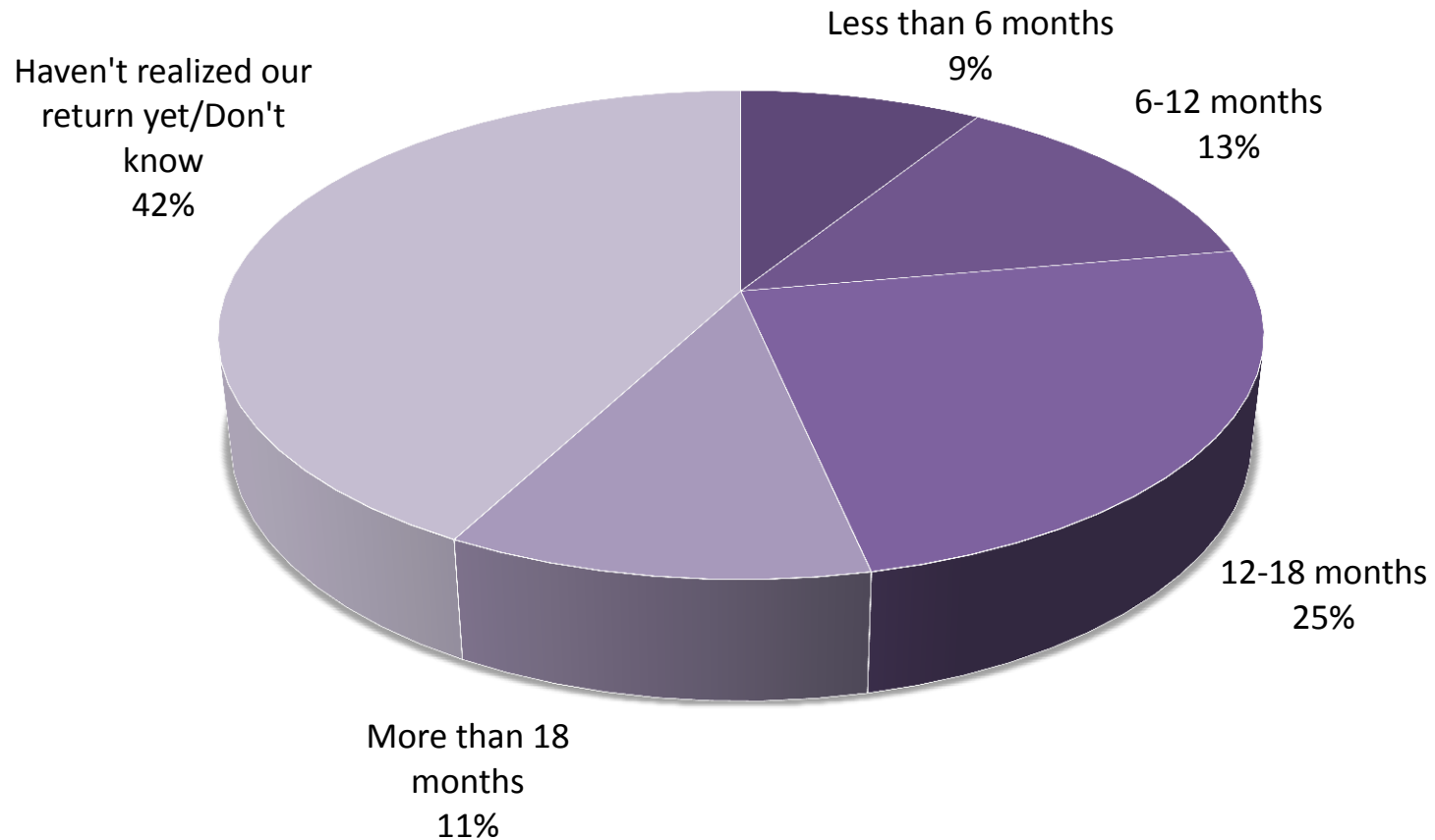
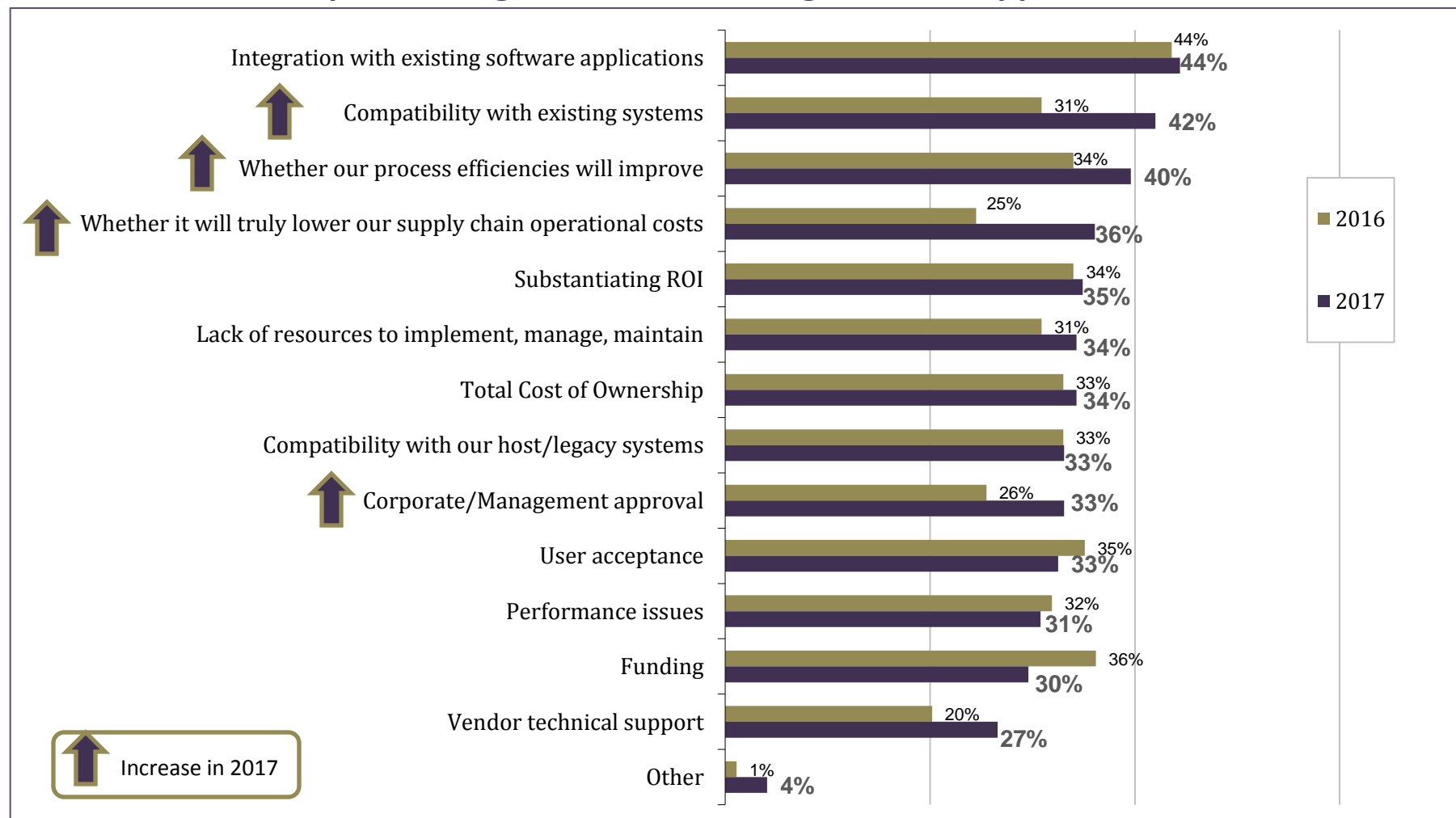**Are you running or do you plan to evaluate/implement engineered labor standards?**

Have you adopted or are you planning to adopt an employee payment program tied to productivity improvements?

We are now running engineered labor standards
26%

Have no plans for engineered labor standards
37%

We plan to evaluate/ implement engineered labor standards
37%

No
54%

Yes
46%

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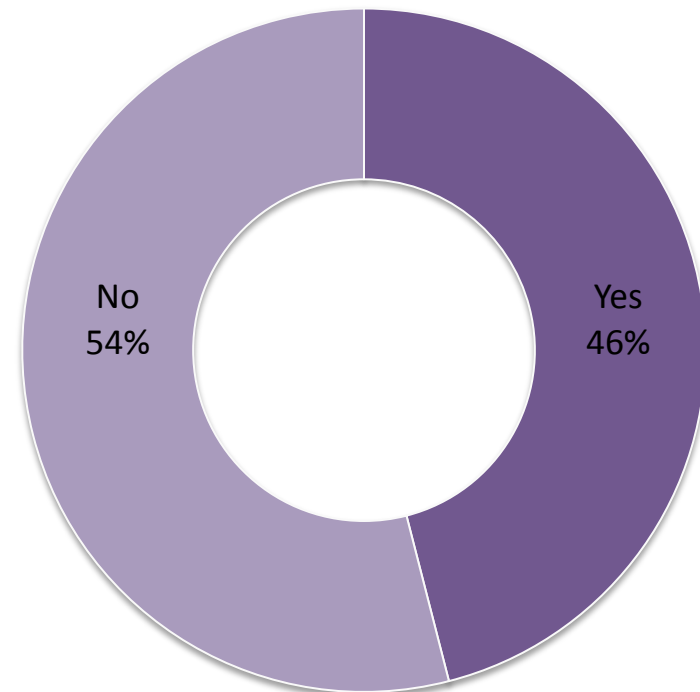
What challenges have you experienced or would you anticipate when adopting or implementing materials handling software applications?

Challenge	2016	2017
Integration with existing software applications	44%	44%
Compatibility with existing systems	31%	42%
Whether our process efficiencies will improve	34%	40%
Whether it will truly lower our supply chain operational costs	25%	36%
Substantiating ROI	34%	35%
Lack of resources to implement, manage, maintain	31%	34%
Total Cost of Ownership	33%	34%
Compatibility with our host/legacy systems	33%	33%
Corporate/Management approval	26%	33%
User acceptance	35%	33%
Performance issues	32%	31%
Funding	36%	30%
Vendor technical support	20%	27%
Other	1%	4%

Increase in 2017

What risks have you encountered or do you envision when implementing or running supply chain or materials handling software applications?

Application feasibility and compatibility with existing processes/procedures/systems

As a CPG company the concern is always the impact to staying compliant with customer requirements. Impact to service levels.

Attaining advertised performance improvements

Being unable to trust the system.

Change management

Change management

Change over-interruption of work flow.

Compatibility with existing system

Compatibility within the software

Competing with resources with other strategic initiatives

Cost overruns, functionality / software capability mismatch.

Cost. Integrate parts into a whole. System being able to handle total needs.

Current software's compatibility with new system.

Data integrity, loss of data

Data merged from old system is lost or corrupted

Data migration, proper configuration, user acceptance, and user training.

Dip in productivity, acceptance to new system and processes

Down time

Down time

Down time

Downtime & integration

Downtime is setting it up

EE training and application of knowledge once system is running.

End to end the whole process

Execution impacts if install is not flawless

Getting everyone on board with the changes.

Getting everyone on the same page

Globally standardized work / user processes & keeping all the data updated in the system real time

Huge employee learning curve

What risks have you encountered or do you envision when implementing or running supply chain or materials handling software applications? *(continued)*

If we are running an ERP, we need to be sure that the 3PL's software can integrate successfully.
Implementation
Implementation issues, integration with existing systems, vendor support
Implementation over existing
implementation with minimal disruption
We are a 3PL with SLA's that are measured in hours.
Improper implementation
Integration
Integration
Integration and adapting
Integration applications that don't get it right all the time, always a critical piece missing
Integration issues
Integration to other systems.
Integration with existing systems
Integration with legacy facilities (interoperability) and reskilling of labor
Keep our same day service levels intact
Lack of acceptance at the site level due to limited resources
Lack of commitment by top management
Lack of compatibility and lack of support for legacy operating systems vs. immense cost to upgrade.
Lack of flexibility in configuration, missing features
Lack of resource knowledge
Lack of ROI
Lack of testing and operations readiness is always biggest risk
largest are resources to implement and end user training/expertise
Learning curve, warehouse standstill while software is introduced into the system
Legacy system integration
Liability implications of data and possible erratic data
Mainly user acceptance
Management approval based on cost.

What risks have you encountered or do you envision when implementing or running supply chain or materials handling software applications? *(continued)*

Manpower
Matching software applications with current OS.
Not knowing the functional deficiencies of the software until you have already committed to the package
Osha regulations
Over confidence that the software can be implemented in the specified time frame.
Product delivery, integration, speed
Realizing the business case
Reliability
Reliability
Reporting
Safety and user friendliness
Smooth startup
Software support...and implementing it right the first time out.
Solution effectiveness (integration of WMS with existing software) My role involves workflow process analysis. With regard to DC's, it includes finding best practices and sending that information upwards. Our IT & Supply Chain departments will make any recommendation decisions to management regarding software specs., compatibility and selection.
Speed of learning
Supply disruption due to insufficient training.
System compatibility and employee buy in.
The rapidly changing environment of technology and the associated challenges of training. By the time we have the products integrated newer technology seems to emerge
Time
Too much too fast
Training, performance, impact to current operations
Unwilling to pay a fortune
Update more and more frequency

What risks have you encountered or do you envision when implementing or running supply chain or materials handling software applications? *(continued)*

| |
|---|
| **User acceptance, infrastructure, return on investment** |
| User resistance. |
| User transition / comfort level / learning new or changed functions; Hardware compatibility (printers) |
| We are a 3PL. Any changes from our customer's feeds. |
| We are a salvage company, we have some unique opportunities. |
| We have encountered unforeseen problems. |
| When we try to put something different or work on something different it blows and doesn't work out |
| Whether it will truly lower our supply chain operational costs, ROI |

When your company purchases software, who do you typically use to integrate the software installation?
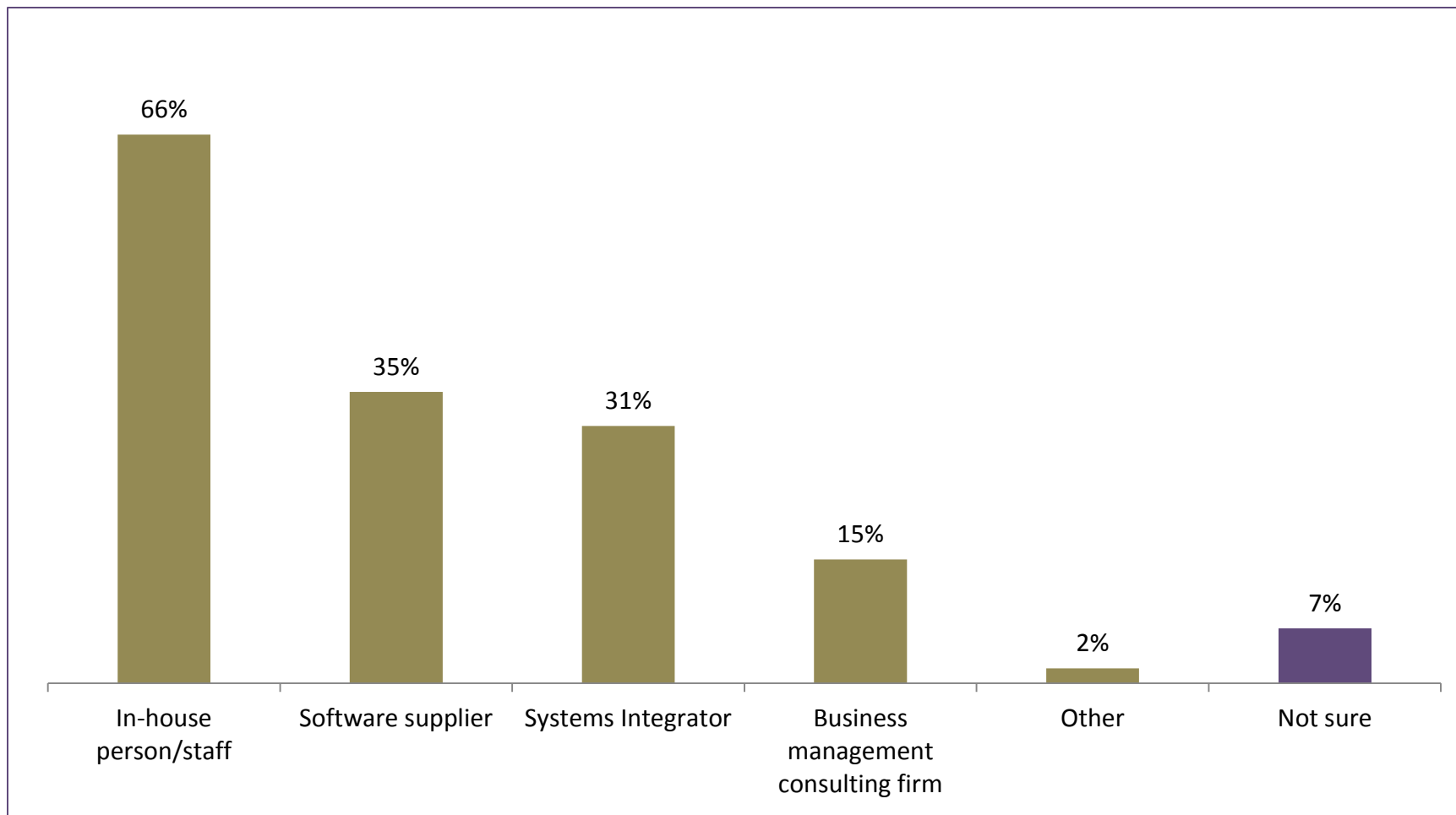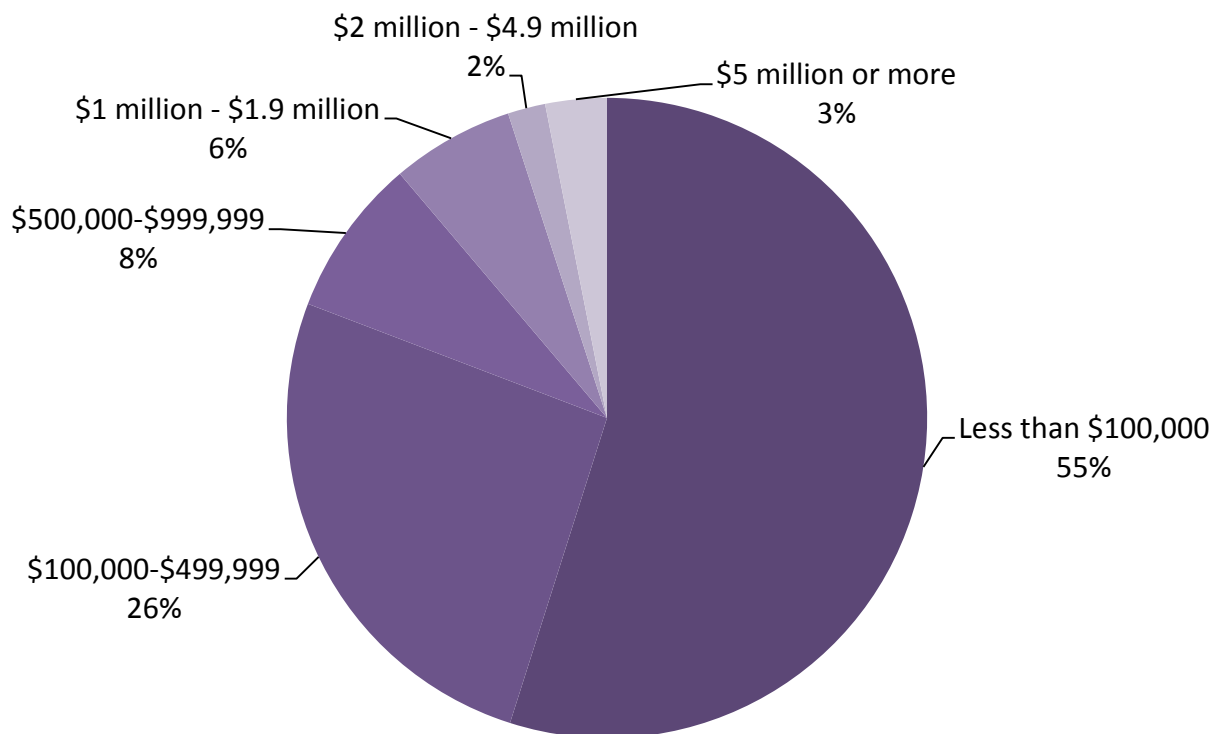
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Approximately, how much will your company spend on supply chain software for your operation including license, integration and training in the next 12 months?

Pie chart:
- Less than $100,000 — 55%
- $100,000-$499,999 — 26%
- $500,000-$999,999 — 8%
- $1 million - $1.9 million — 6%
- $2 million - $4.9 million — 2%
- $5 million or more — 3%

	2013	2014	2015	**2016**	2017
Average $$ plan to spend	$572,000	$663,326	$679,220	**$472,900**	$504,630
Median $$ plan to spend	$92,170	$113,333	$144,444	**$88,680**	$91,010

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If you had the opportunity to implement one software solution or application that would improve any aspect of your materials handling operation, what would it be?

A true Materials Handling Software is needed
Advanced shipment notification from vendors.
Anticipate end of life and project acquisition needs using volatile production forecasting data
ASRS
Asset Tracking
Automating material receiving with scanners
Bar code
BAR CODE
Bar code inventory system for accuracy.
Bar code scanning
Bar Code Scanning Warehouse Management
Bar coding
Bar coding
Barcoding
Barcoding
Barcoding inventory and locations and/or RFID for assets and tools
Be careful when you go to the cloud
Better inventory control
Better integration and communication
Better integration with TMS
Better warehouse management
Bill of Materials
Component inventory control and tracking
Control of physical assets would be front runner.
Cubing
Delivery analysis
Easy integration with existing programs
Envista
Equipment tracking

ERP
ERP
ERP with WMS
Faster Cycle Counts
Finished Goods
Fleet management
Fleet management
Full integration of ERP to TMS.
Heat mapping
Improved metrics systems, real time reporting
Integrate a WMS with our current EMS
Integrate systems
Interacting between different control points.
Inventory
Inventory accuracy.
INVENTORY CONTROL
Inventory control and slotting
Inventory movement and replenishment.
Kiva system
Labeling
Labor Management
Labor management software
Labor management system
Labor Management tools and software
Labor management
Lease
Less down time
Lift truck mounted computers

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If you had the opportunity to implement one software solution or application that would improve any aspect of your materials handling operation, what would it be? *(continued)*

LMS
LMS
Lower cost
Lower operating costs
Material usage
Materials tracking
Mobility
More accurate GPS info
More open software
New MRP
Order fulfillment (picking)
Order reliability
Palletizers or automated movement equipment
Part location / carousel
pick tickets
Pick to light
Pick, Pack and ship operations have greatest opportunities
Picking automation
PkMS
Point of use for incoming products and outgoing products
Possibly a new ERP system, but the cost is huge
Process controls
Product tracking into loads
Quicker movement of inventory
Raw material replenishment
Receiving and wire tracking
Receiving through inspection
Reduce error
Reliable scanners
Reporting

RFID
RFID
RFID
RFID asset tracking
SAP
SAP
SAP
SAP
Scanning
Schedule optimization
Scheduling and planning
Shipment Management
Shockwatch across all plants
Slotting software or warehouse control systems
Software that provides pick path for distribution
Solumina
Something that merges with our truck dispatch program excel based
Standardize
TMS
TMS
To find some kind of thing for a robot for my business
Tracking
Tracking and materials conditions
Transport Management System
Transportation
Unified ERP
Upgrade our WMS
Upgrade WMS and implement YMS
Velocity

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If you had the opportunity to implement one software solution or application that would improve any aspect of your materials handling operation, what would it be? *(continued)*

Warehouse control
Warehouse Execution Software
Warehouse inventory
Warehouse Robotics
Waveless pick generation for consumer orders.
WCS, Slotting Software
WES
Wireless technology
WMS
WMS
WMS
WMS
WMS
WMS
WMS
WMS
WMS
WMS
WMS
WMS software for our clients
Workload management
Would implement a label applicator on our production lines that would communicate with SAP using Bartender software.
Zoning

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Respondent Demographics

Industry

Manufacturing	% of respondents
Food, Beverage & Tobacco	10%
Automotive & Transportation Equipment	6%
Computers & Electronics	5%
Electrical Equipment	5%
Chemicals/Pharmaceuticals	4%
Industrial Machinery	4%
Paper/Printing	4%
Textiles/Apparel	4%
Aerospace	3%
Fabricated Metals	3%
Primary Metals	2%
Furniture	2%
Plastics & Rubber	1%
Other Manufacturing (specify)	14%
Non-manufacturing	
Wholesale Trade	11%
Retail Trade	4%
3rd Party Logistics Provider	5%
Transportation/Warehousing Services	7%
Carrier - Air, Ocean or Ground	1%
Other Non-Manufacturing (specify)	6%

101%

Job function

Corporate/Divisional Manager — 19%
VP/General Manager — 19%
Logistics/Distribution Manager — 16%
Warehouse Manager/Supervisor — 12%
Supply Chain Manager — 7%
Operations Manager — 11%
Purchasing Management — 2%
Other — 14%

Company size

Under $10 million — 29%
$10 million to $49.9 million — 18%
$50 million to $99.9 million — 11%
$100 million - $249,999 million — 11%
$250 million – $499,999 million — 8%
$500 million - $999,999 million — 7%
$1 billion - $2.49 billion — 3%
$2.5 billion or more — 13%

Average revenues	Median revenues
$471.2M	$61.1M

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