



The  
**Ultimate  
Readiness  
Checklist**

*For the Holiday Selling Season*

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## **1. Tune-up Physical Equipment**



Your physical equipment is the backbone of your fulfillment operation. Too often the stresses of holiday volume can burden physical systems and stress your fulfillment operation. Now is a good time to give your EDI systems a holiday tune-up and confirm that all working equipment is up to the task

- Check that physical systems and key software products are fully updated.
- Replace or upgrade aging equipment.
- Check for available space on working systems and upgrade disks or clean up disk space.
- Confirm that printers are up to the task of the higher seasonal volume of printing packing slips and shipping labels.
- Be sure to have ample printing supplies with suppliers of each documented.

## **2. Evaluate Integrations**



EDI environments routinely trade transactional information with critical fulfillment systems. Integrations are key to handling high volumes of seasonal traffic and need to be operating smoothly during periods of stress. Failure of just one link in the

chain can create havoc with efficient fulfillment operations.

- Trace the data from to and from each integrated environment where EDI data is shared.
- Confirm that all integrated systems are updated to the latest release.
- Confirm that your integrations are efficient and saving time and steps in your fulfillment process.
- Check for manual steps that still exist in your fulfillment process that can be eliminated with an integration.
- Products in integrated environments often change over time and should be reviewed for efficiency.

### 3. Evaluate Online Commerce Platforms



Holiday orders can come in a fast and furious pace and it's important to know that your eCommerce systems can adapt. Pay particular attention that the shopping cart works quickly and efficiently as studies show that the easier it is to place orders, the more orders are placed. Recognize in your fulfillment planning that eCommerce orders are often placed off-hours on nights and weekends. If shopping is not a smooth and friendly process, orders will suffer.

- Check your online web presence for efficiency of process.
- Place test orders and have disinterested 3rd parties place test orders to confirm the ordering experience
- Confirm that orders placed online flow smoothly into your fulfillment operation.
- Make a specific plan to fulfill orders placed off hours on nights and weekends.

## 4. Watch your Data Flow Carefully



Look at your current fulfillment operation critically. Very often inefficiencies can creep into smoothly running operations. Trust your frontline staff. Fulfillment staff are sometimes hesitant to discuss efficiency issues proactively but when asked are more than happy to express an opinion. Recognize that retail and direct to consumer shipper have their own challenges and confirm optimization for each type.

- Monitor routine day-to-day activities for inefficiencies.
- Check that there are no unnecessary manual steps.
- Confirm that all physical materials needed for packing and shipping are located properly.
- Speak with the individuals that perform different fulfillment tasks for thoughts on efficiency.
- Test out new procedures prior to high volume periods.
- Review the unique fulfillment steps that serve retail and direct to consumer shipping for their own challenges.

## 5. Update Staff Training



Holiday fulfillment can often involve new or repurposed staff to help out. Even existing fulfillment staff can have gaps in their knowledge of procedures with some staff becoming de-facto "specialists" in certain areas. Cross-training of staff helps share knowledge of different areas and protect from occasions when selected staff may be unavailable.

- Keep your employees up to date on current standards and procedures.
- Meet with fulfillment staff individually and as a group.
- Individual employees often have their own efficiency "tricks" to be shared with the staff at large.
- Provide a forum allowing fulfillment staff to learn from each other.

- Train all staff on all preferred fulfillment methods and document them as the working standard.
- Select a senior staff member to provide assistance and oversight on the adherence to the standards.

## 6. Evaluate Service Providers



Holiday environments are routinely stressed to the breaking point. This not only holds true for internal systems but also for external services provided by 3<sup>rd</sup> parties. 3<sup>rd</sup> party providers need to be carefully examined especially those having service issues outside of the holiday season. 3<sup>rd</sup> party services are out of your control and identifying and evaluating those services will provide a path to peace of mind and faster service.

- Identify each 3rd party provider and the service that they provide.
- Contact each provider to confirm services are up to date and in place for your operation.
- Evaluate new or seasonal services offered by 3rd parties.
- Identify and document the support protocol for each 3rd party including phone numbers, web support services, and names of dedicated support personnel.
- Confirm that you are currently being served well by your 3rd party providers.
- Check that your EDI provider has the flexibility to adapt to changing needs on short notice.

## 7. Reach out to Retail Partners



Retail trading partners often have web portals for vendors to obtain the latest information on planned activities and new requirements. The burden is on the vendor to identify new requirements and non-compliance can result in surprise chargebacks after the season.

- Be sure to check the web portals of each retail partner for notices of new requirements.
- Check with your EDI provider if you have questions about new protocols or are unsure how to implement them.
- Evaluate any new requirements against your fulfillment operation to confirm capabilities are in place.

## 8. WMS Update or 3PL



Check the efficiencies of your fulfillment engine whether you do your own fulfillment using a WMS or work through a 3PL. Your WMS or a 3PL drives fulfillment and is a critical link in the fulfillment chain. Armed with the evaluation of your fulfillment steps, the latest requirements from your retail partners' portal, and feedback from staff confirm that the core of your fulfillment operation is strong and ready for the season.

- Confirm the efficient exchange of information with your WMS environment or 3PL.
- Identify automation gaps between ordering and fulfillment to be sure information flows freely without manual intervention.
- Establish that your shipping environment is capable of handling large volumes of holiday fulfillment.
- Identify support protocols from WMS vendors and 3PL providers including methods to obtain urgent services.

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**\* Check back for more steps  
this Monday**