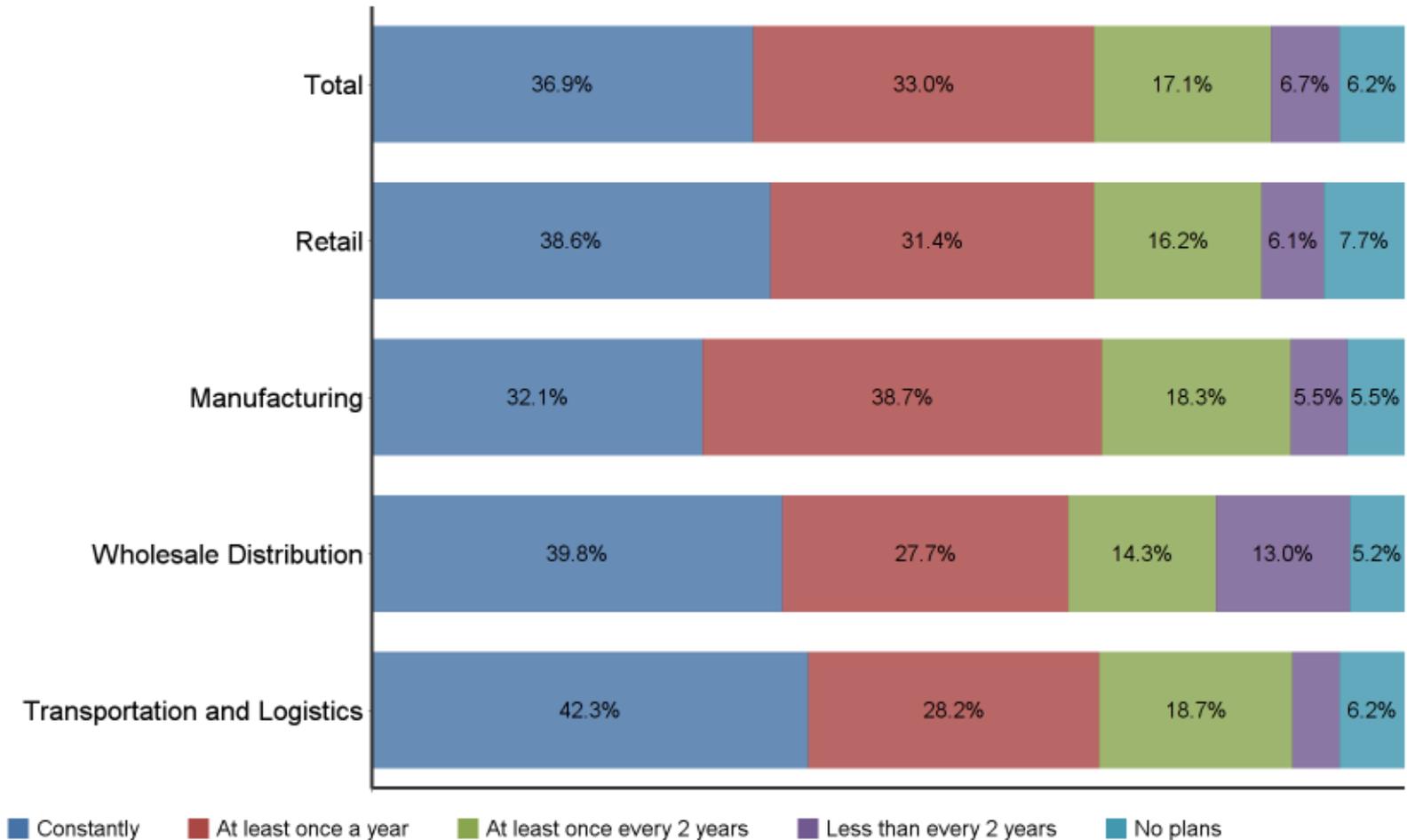




WAREHOUSE VISION 2020 GLOBAL SURVEY RESULTS

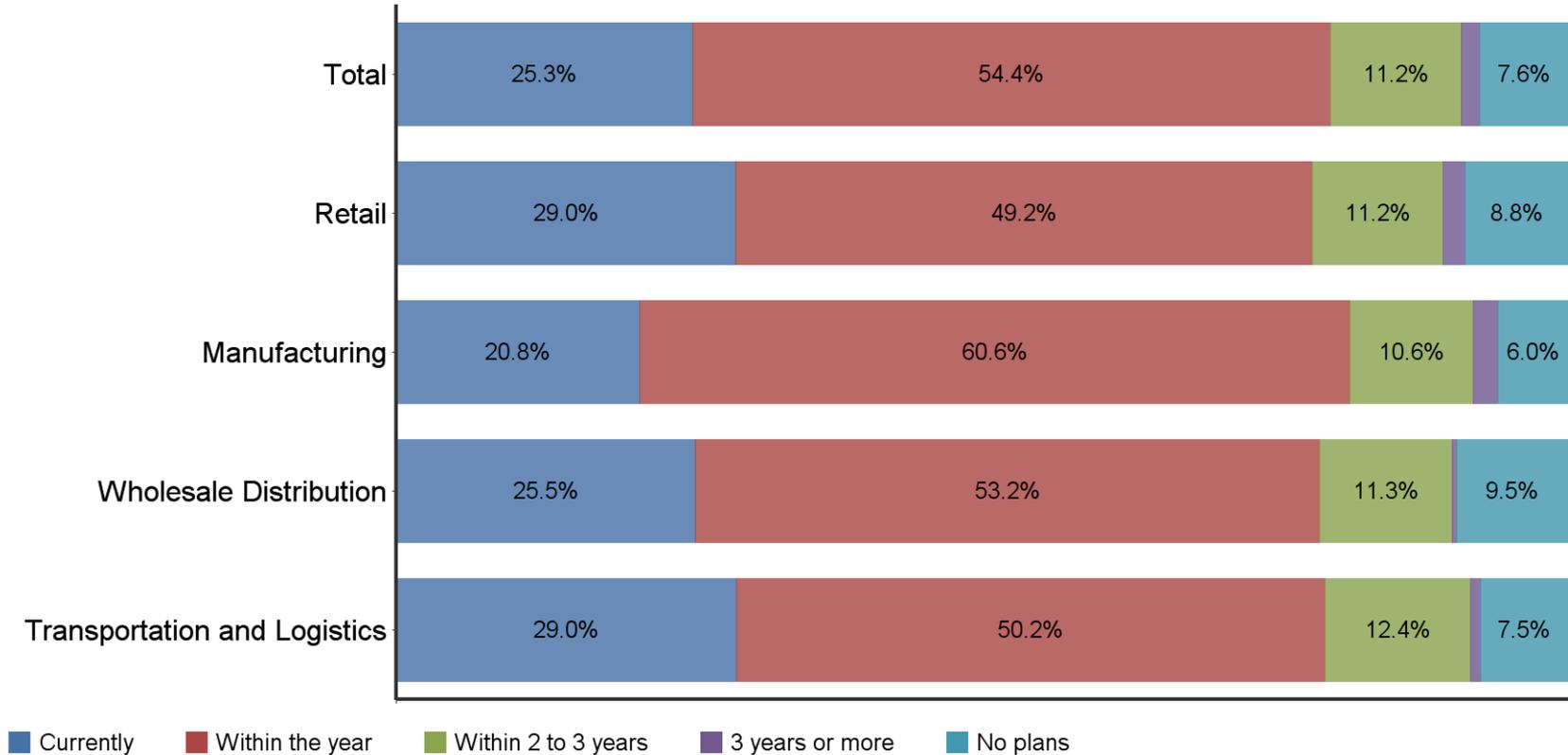
SUPPLY CHAIN NETWORK EVALUATED OFTEN

Q12 How often does your company re-evaluate your supply chain network?



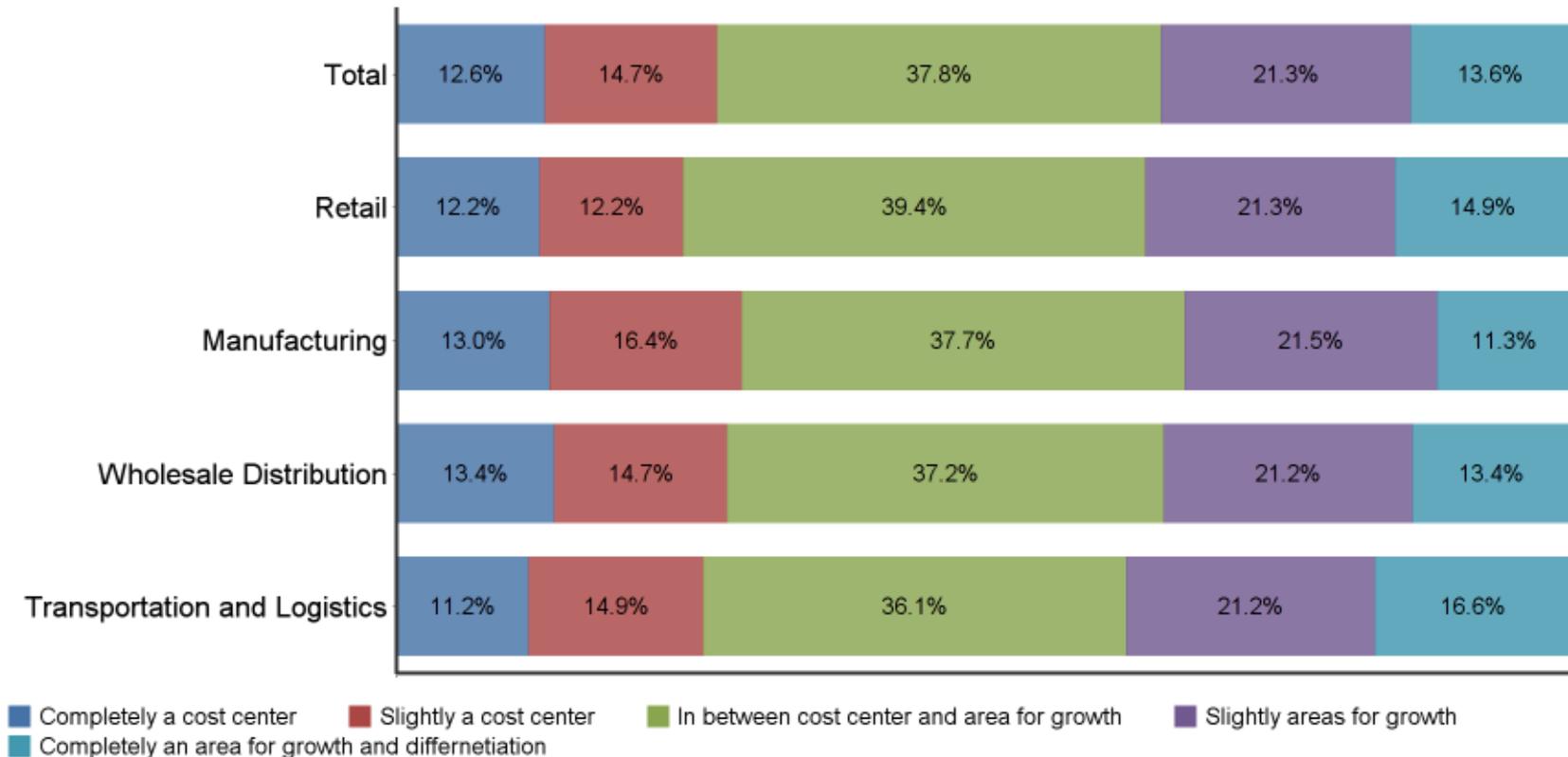
SUPPLY CHAIN NETWORK BEING EVALUATED

Q13 When will your company NEXT re-evaluate its supply chain network?



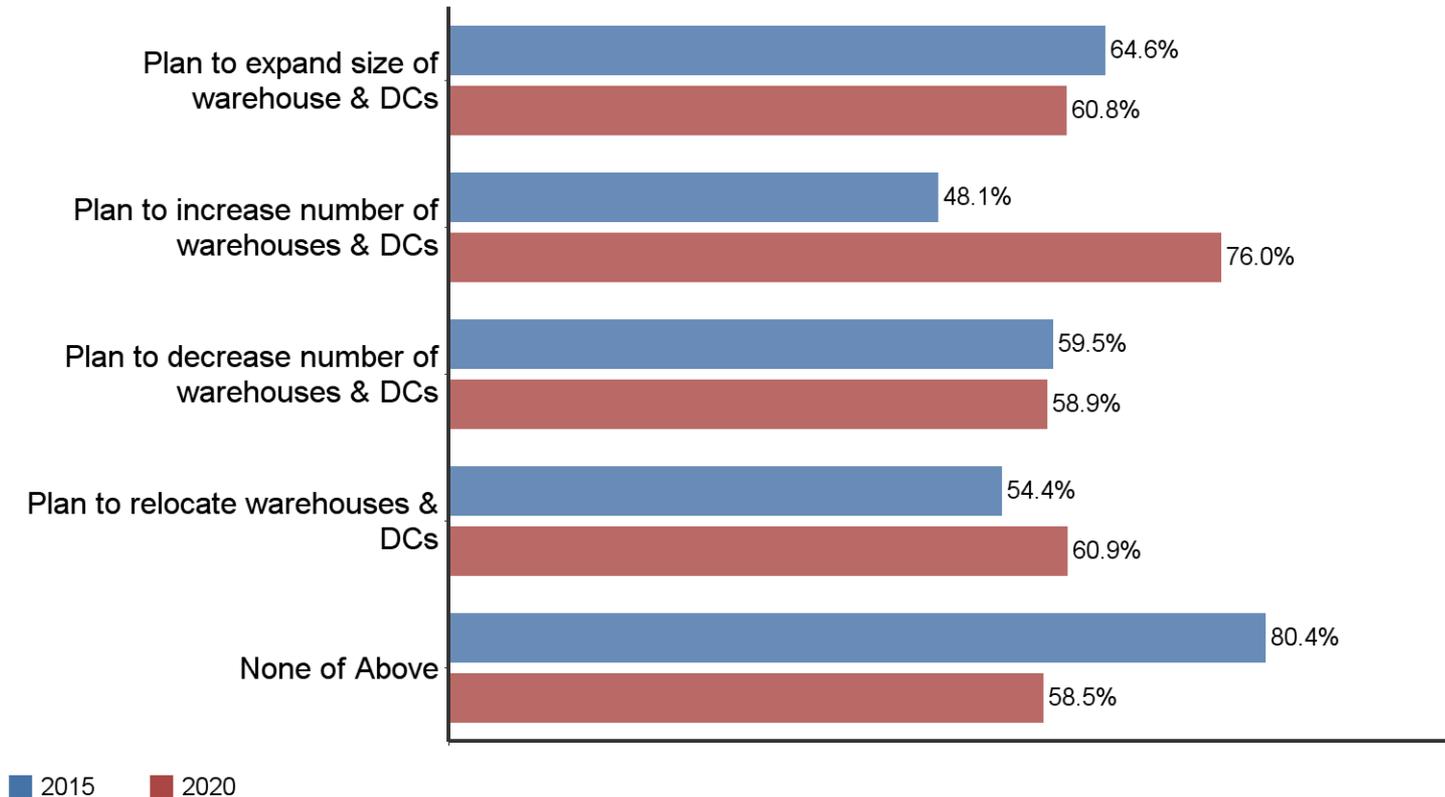
VIEW WAREHOUSE/DC OPERATIONS

Q14 How does your company management view your warehouse/distribution center operations?



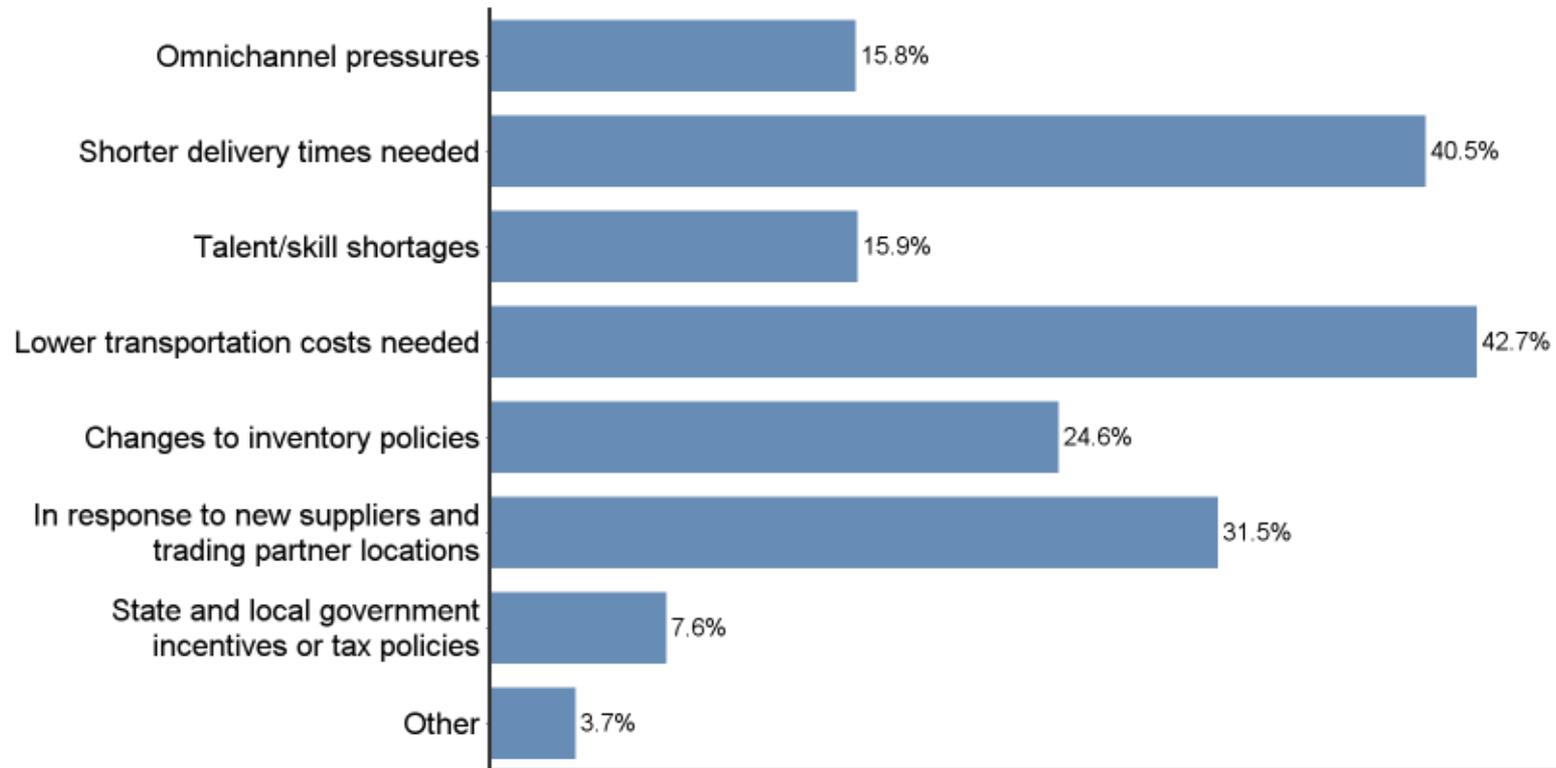
PLANS TO INCREASE NUMBER AND LOCATION OF WAREHOUSES

Q15 What are your plans for warehouse and DCs this year? And in 2020?



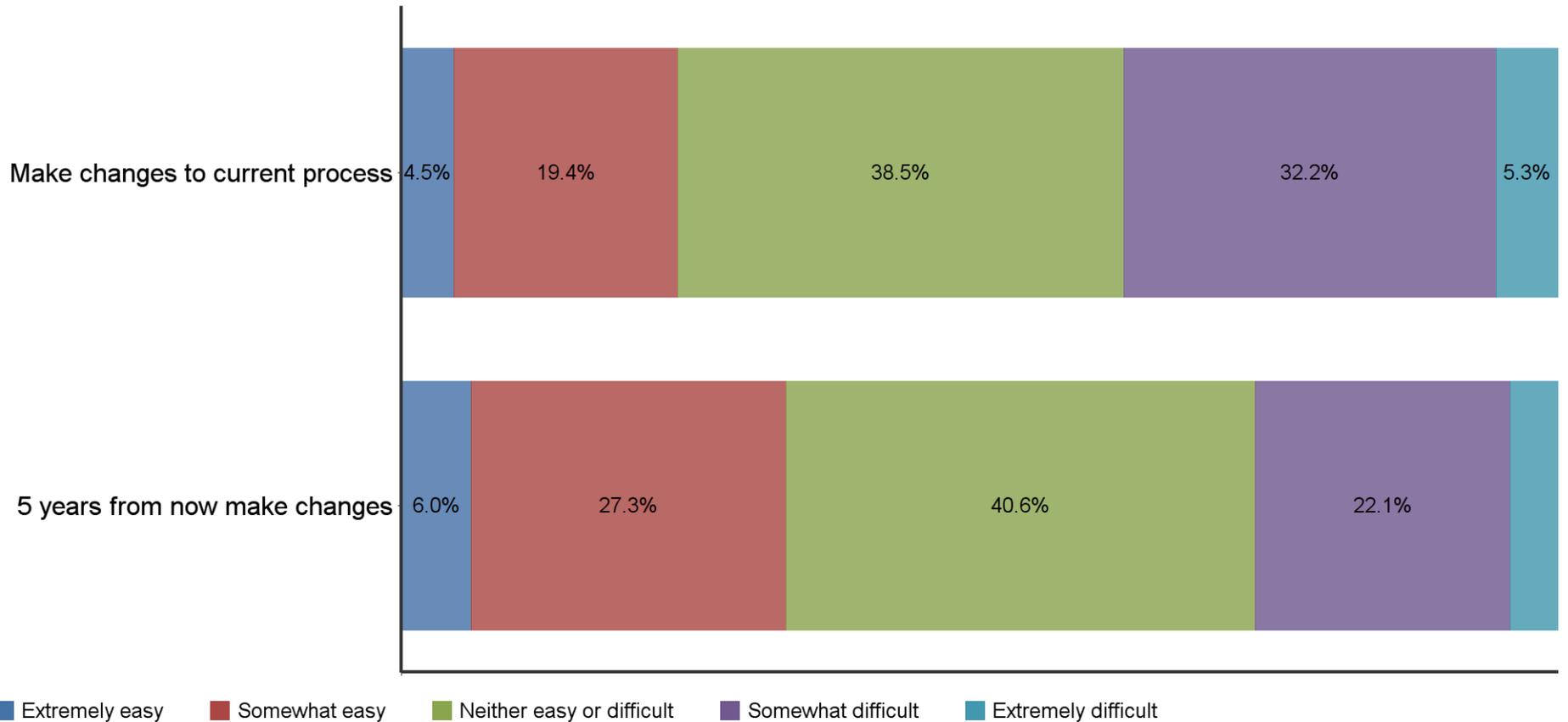
DRIVERS FOR CHANGE IN WAREHOUSE USAGE

Q16 Which of the following are driving these changes in your warehouse and DCs usage?



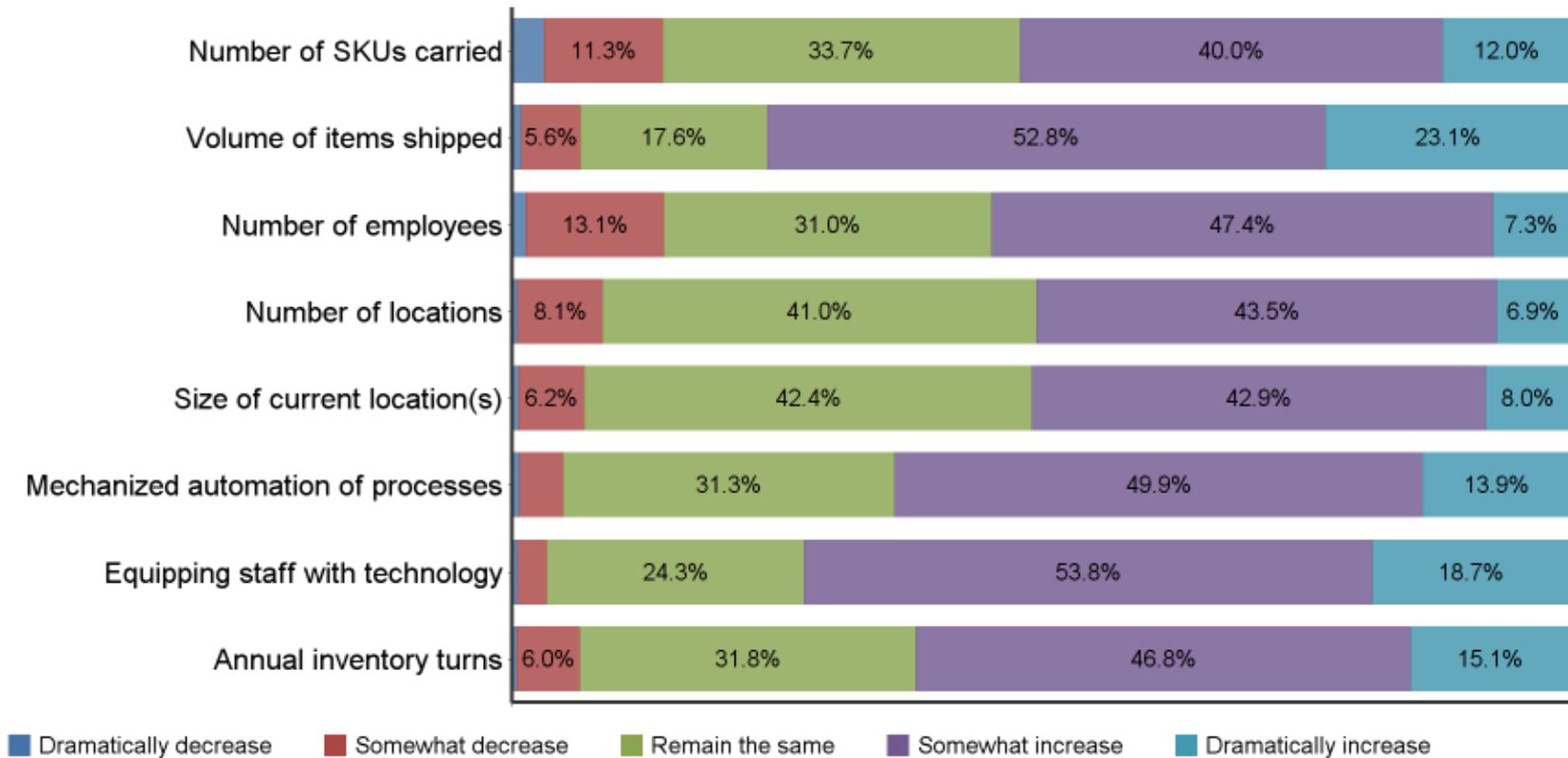
EASE IN CHANGING SUPPLY CHAIN PROCESS

Q17 How easy is it to introduce changes into your organization's supply chain process (introducing new user interface, changing execution of tasks, pick paths)? How easy do you think it will be in five years?



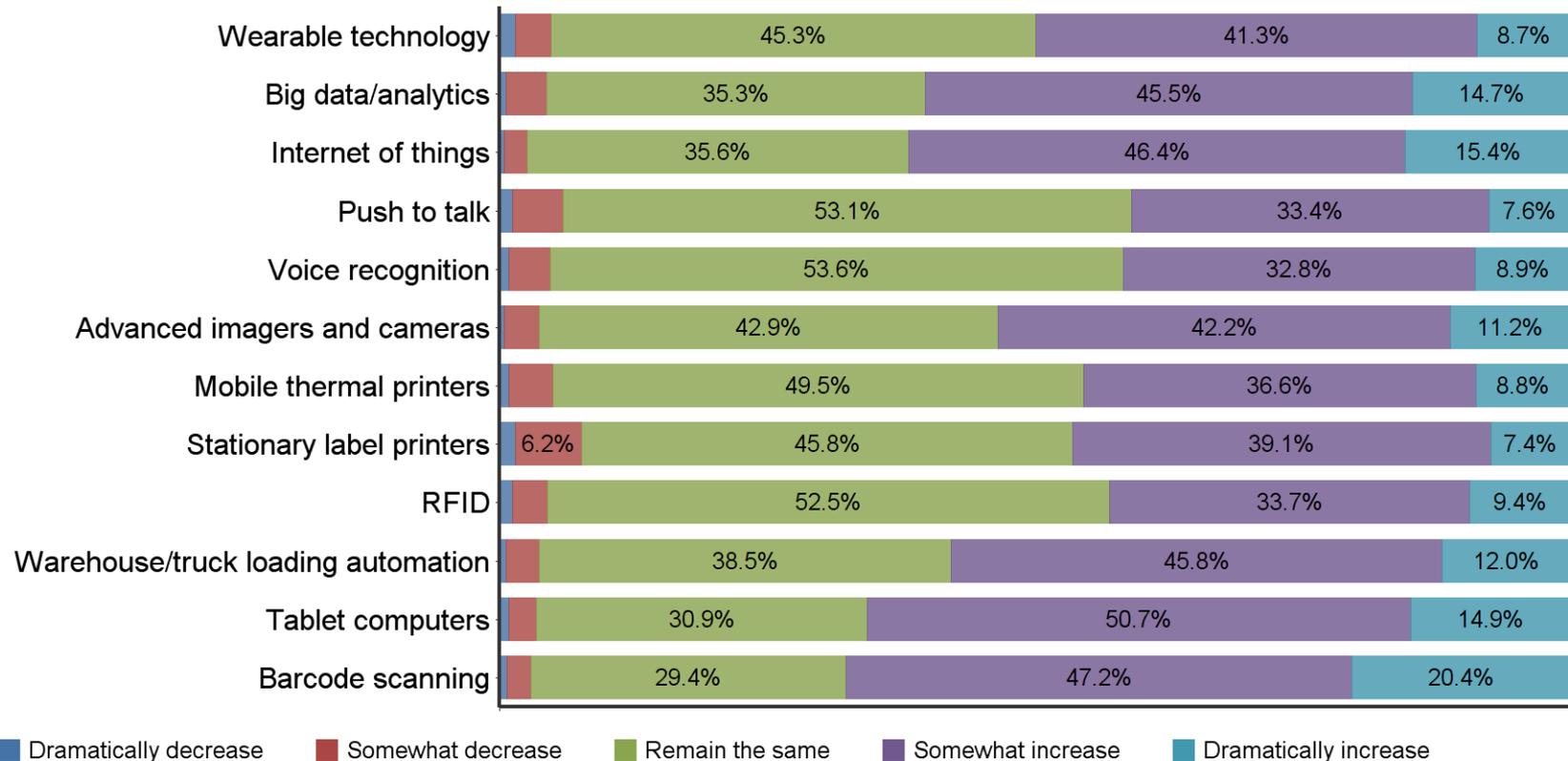
EXPANSION PLANS

Q18 For the next five years, what will be your company's expansion plans for:



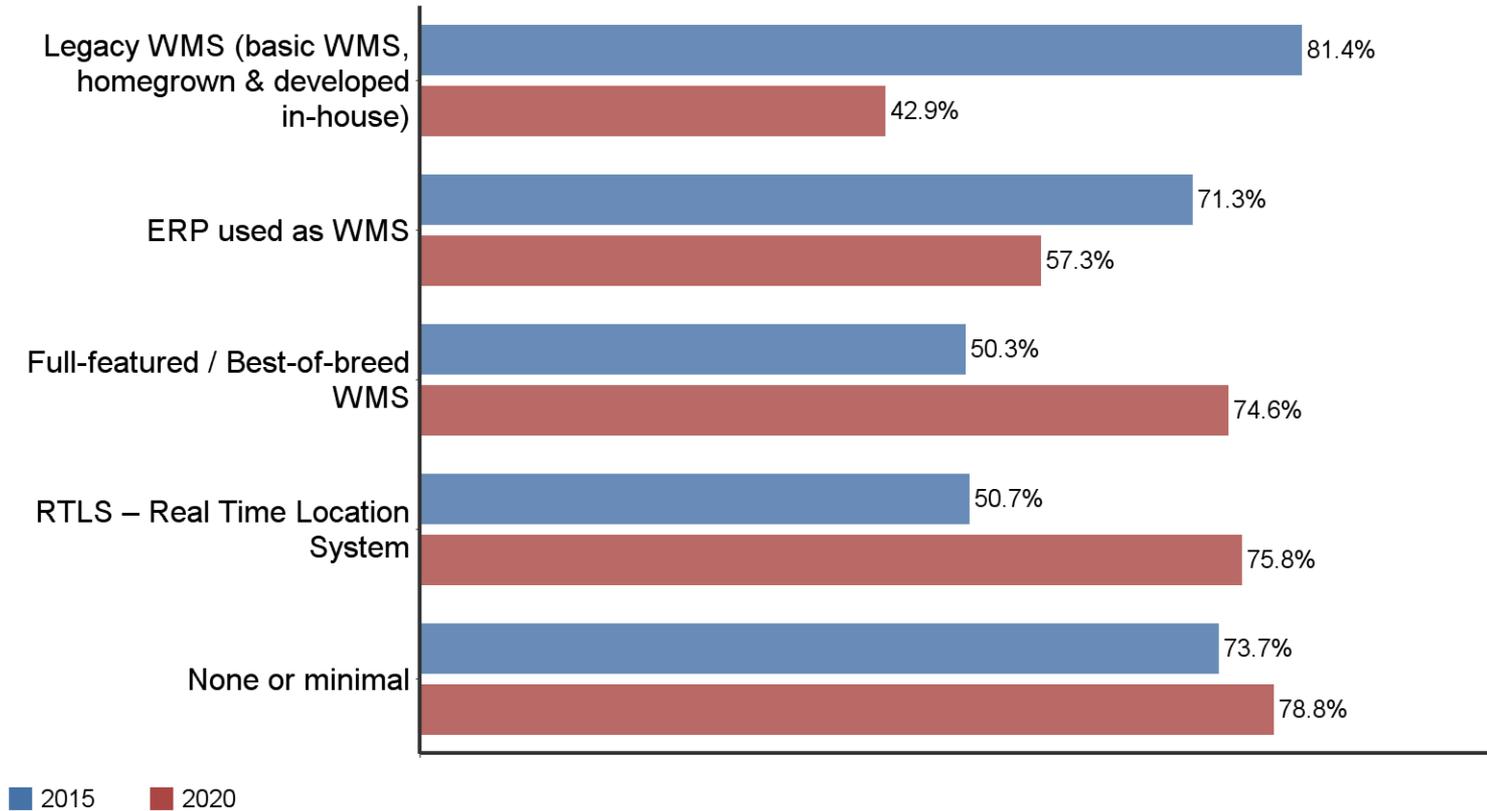
TECHNOLOGY EXPANSION PLANS

Q19 For the next five years, what will be your company's expansion/usage plans for:



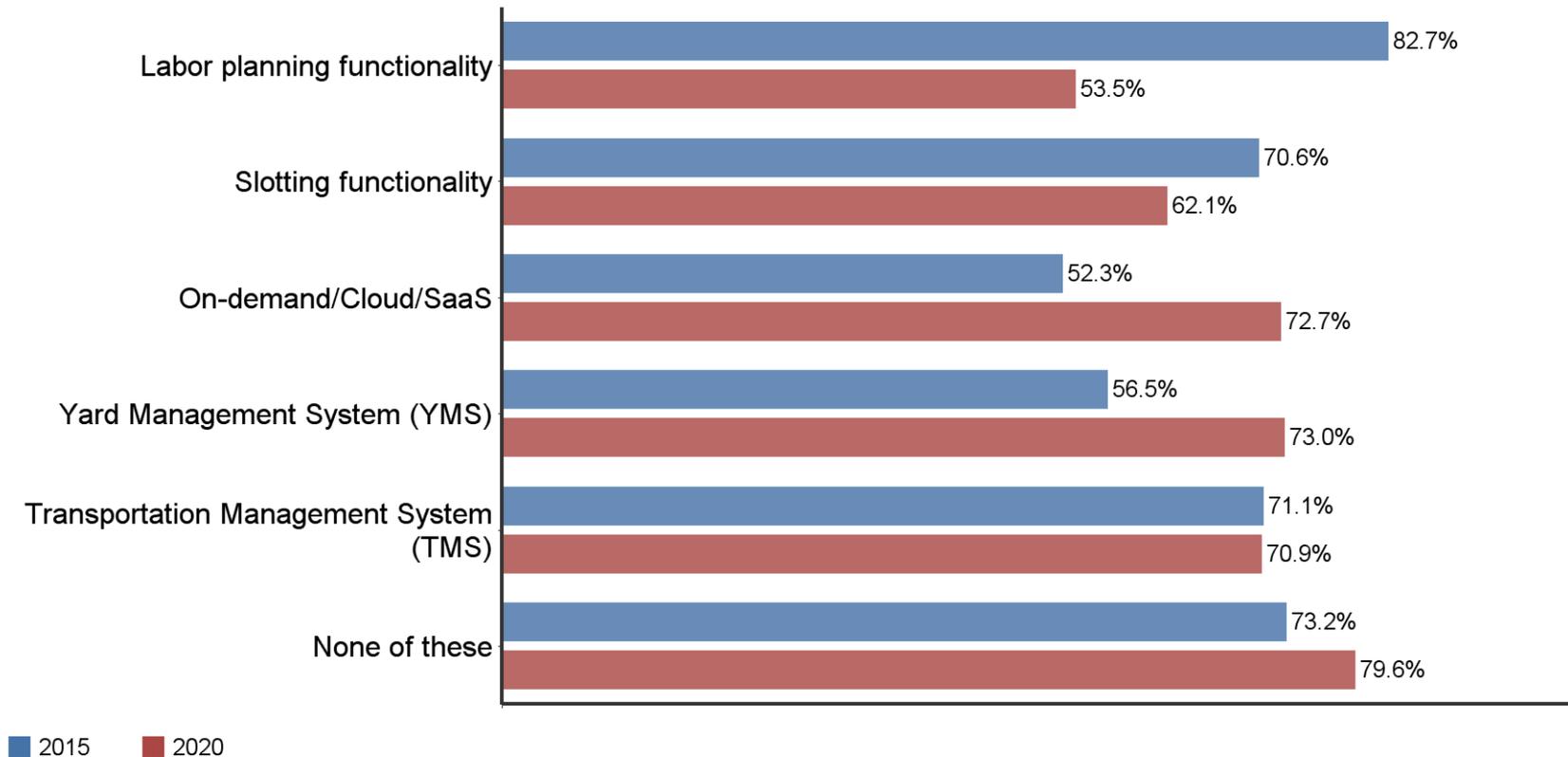
WAREHOUSE MANAGEMENT SYSTEMS IN USE

Q20 What Warehouse Management System (WMS) is currently in use at your distribution center? What will be in 2020?



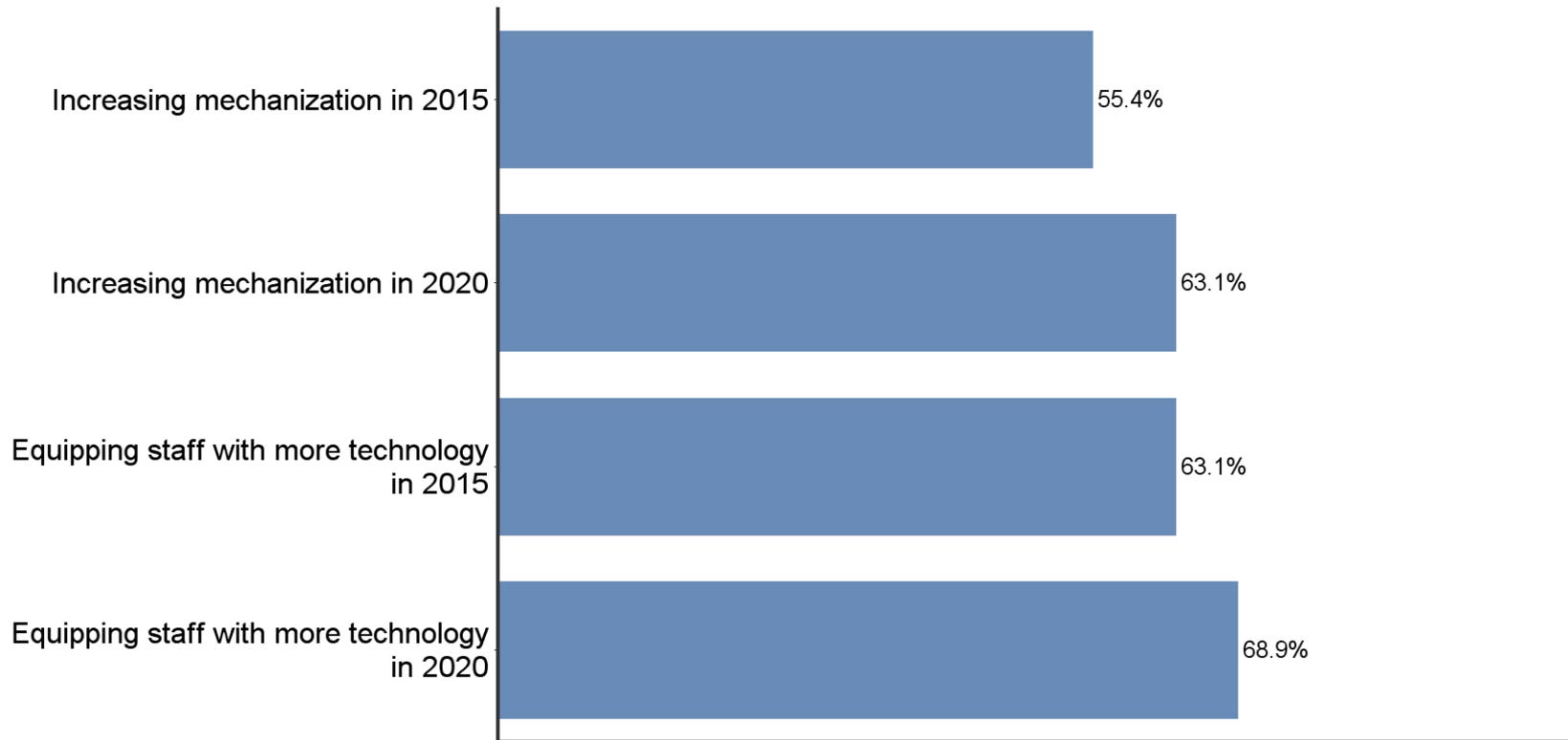
WAREHOUSE MANAGEMENT FUNCTIONALITY

Q21 What functionality exists in your Warehouse Management System (WMC) currently in use at your distribution center? What will be in 2020?



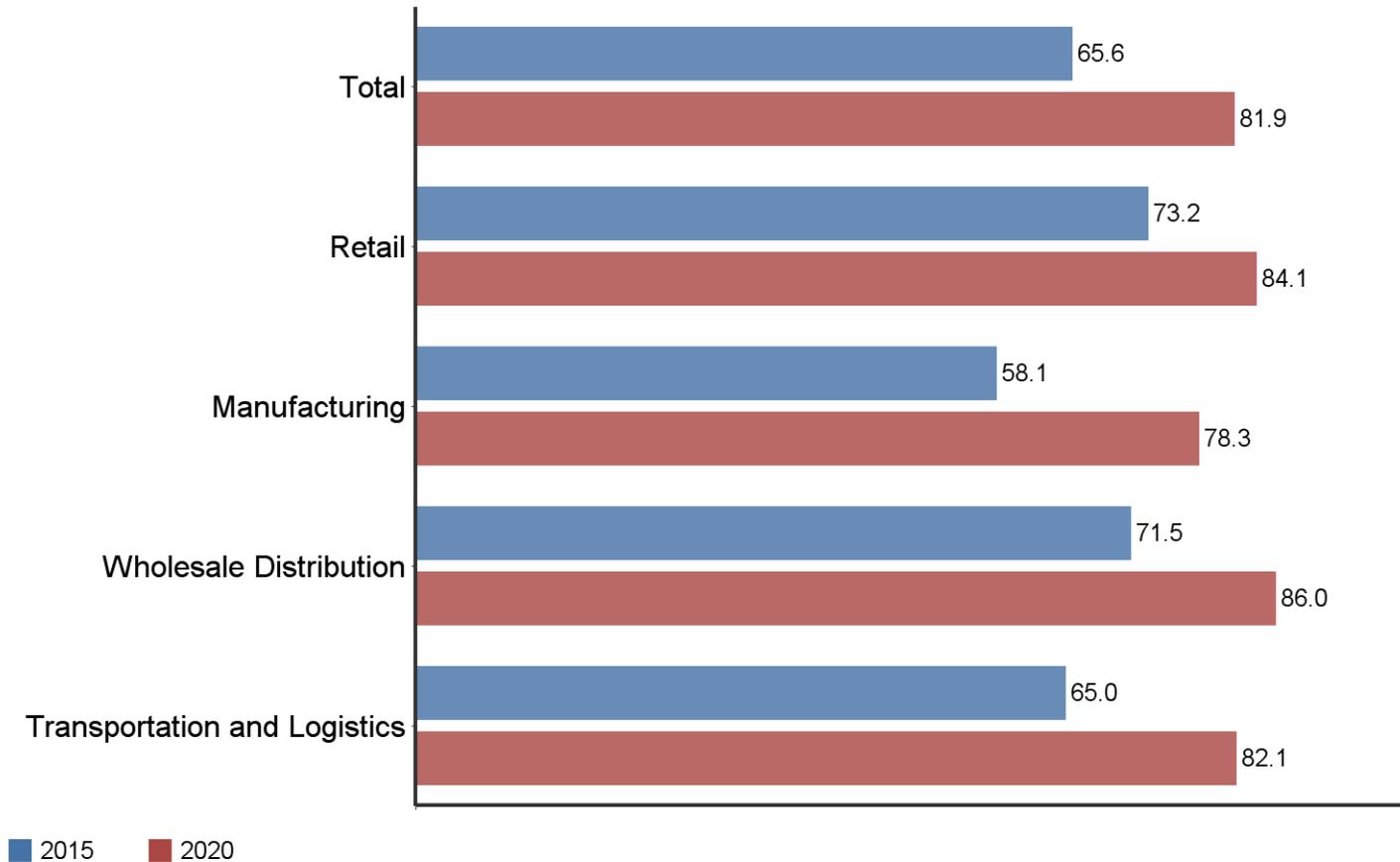
LOOKING FOR MORE MECHANIZATION AND TECHNOLOGY IN WAREHOUSES

Q22 Are you currently looking at more mechanization (complete lights-out warehousing, or equipping staff with more technology to streamline and automate processes) in your warehouses and distribution centers? And by 2020?



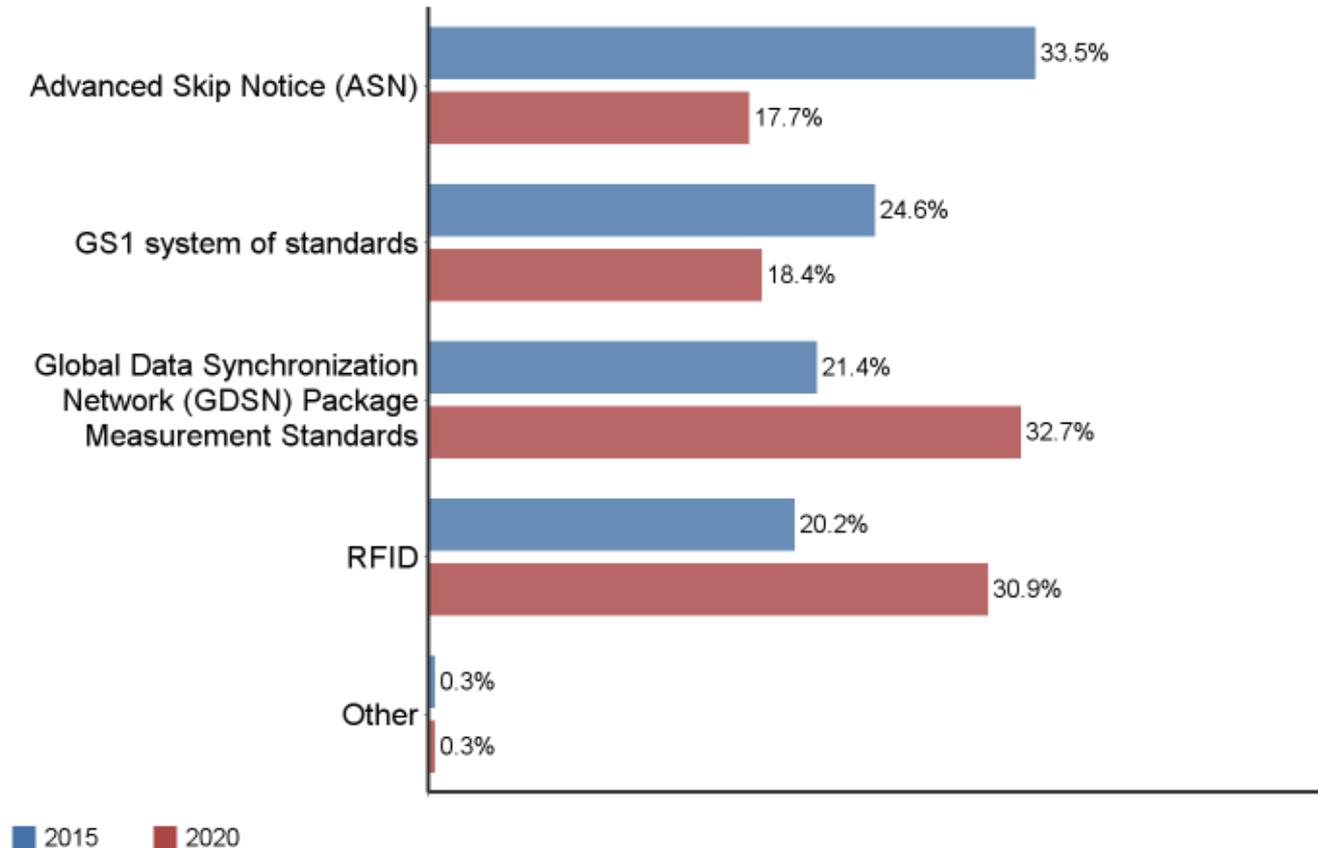
PERCENTAGE OF BARCODED ITEMS INCREASING

Q23 What percentage of inbound items is bar coded today? What percentage do you anticipate will be in 2020?



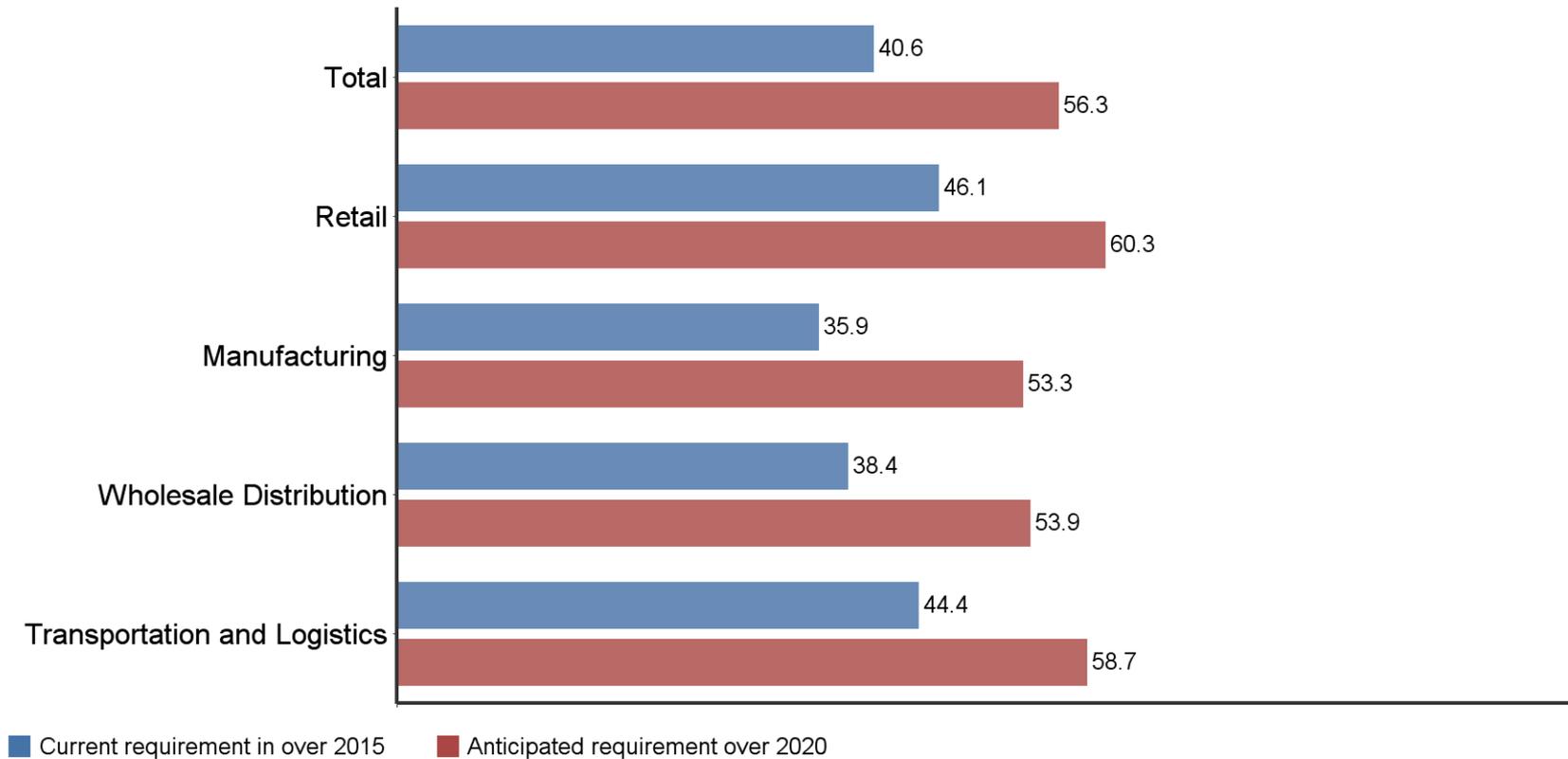
SHIFTING SUPPLIER REQUIREMENTS

Q24 Which of the following is the current requirement for supplier usage? And what will it be in 2020?



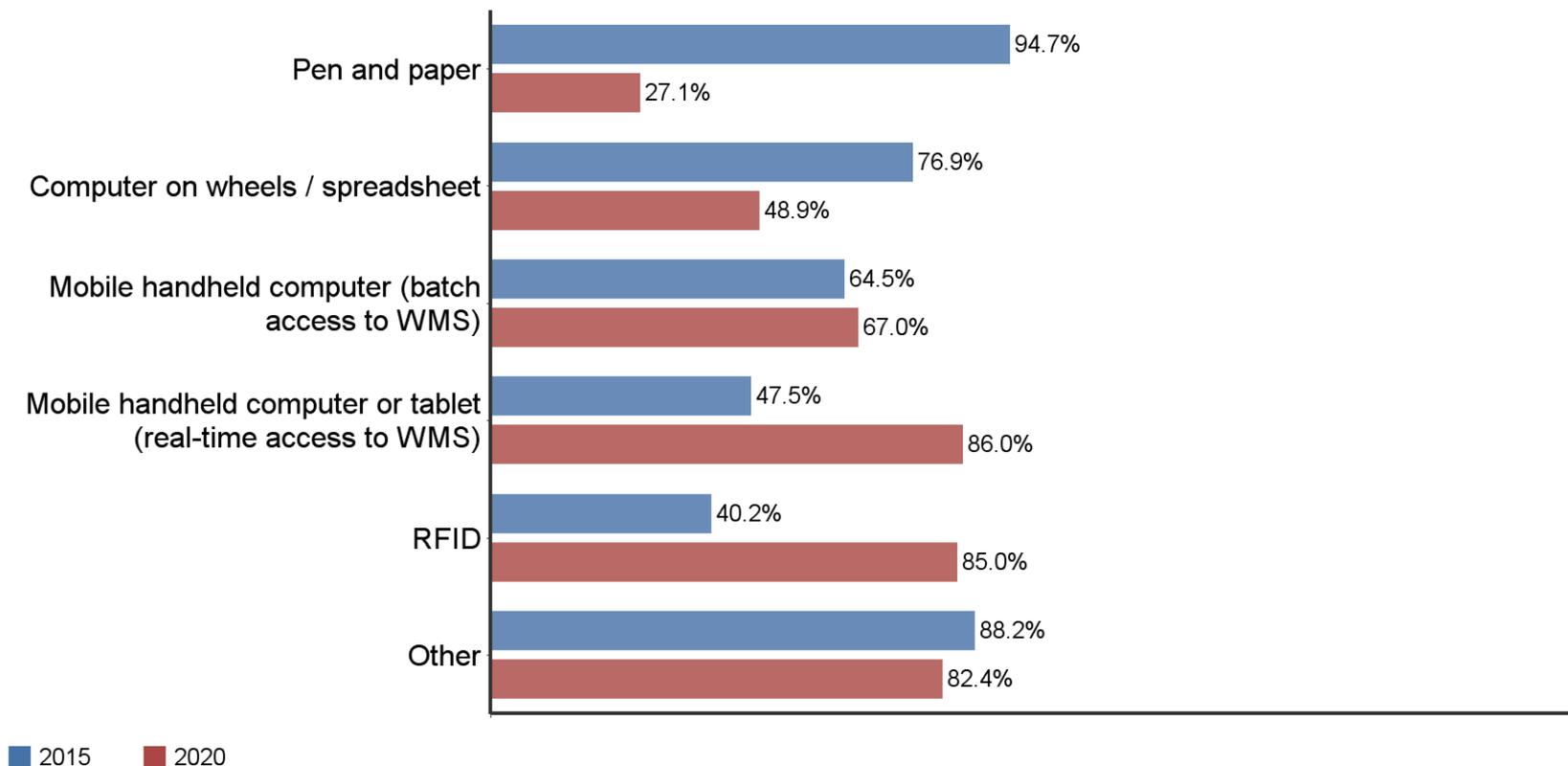
CROSS-DOCK UTILIZATION INCREASING

Q25 What percentage of the business is currently implementing cross-dock utilization? And what do you anticipate it will be in 2020?



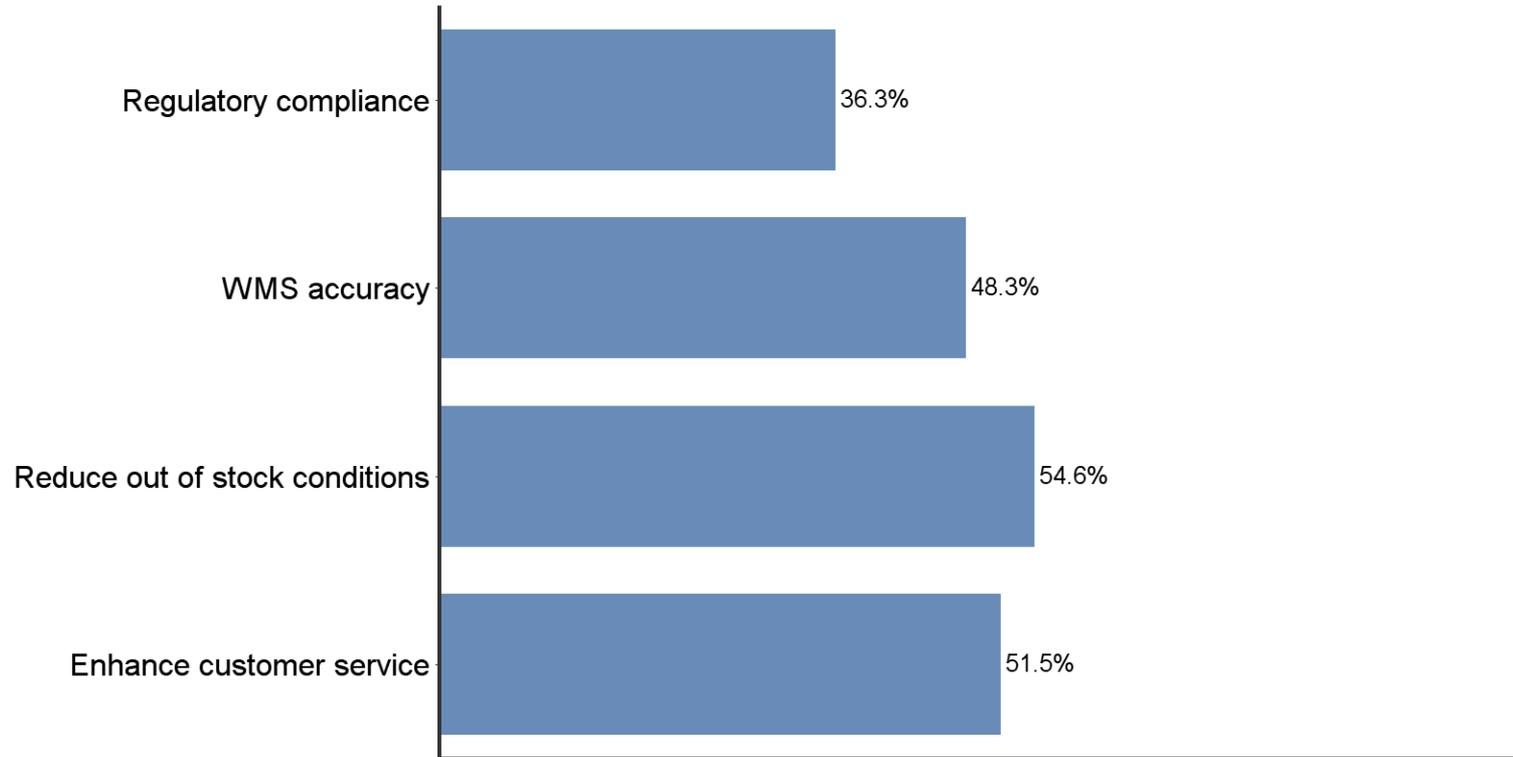
CYCLE COUNT AND INVENTORY MAKING ADVANCEMENTS

Q26 How are you currently conducting cycle count and inventory validation? How do you anticipate it will be done in 2020?



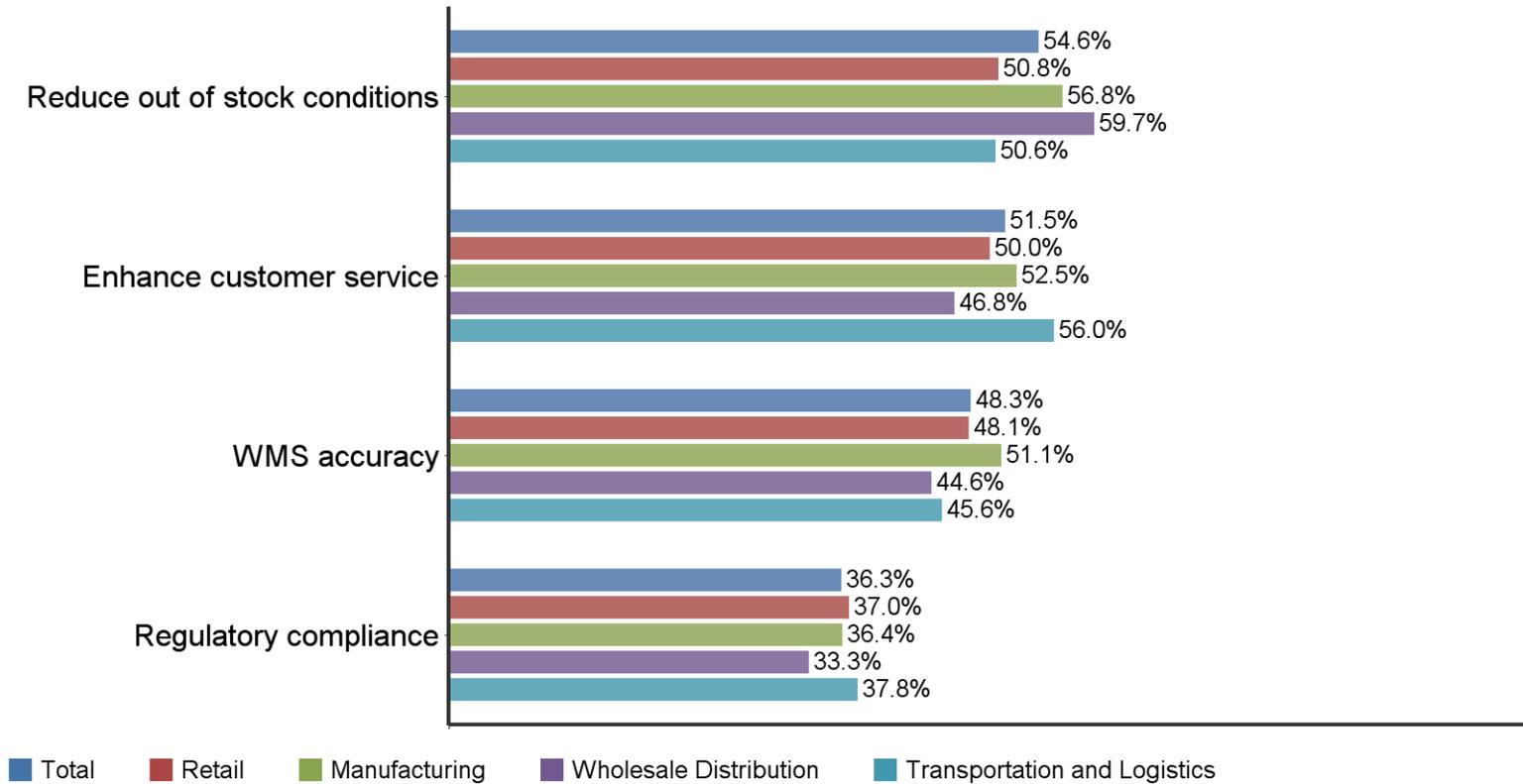
MOTIVATION FOR CYCLE COUNT/INVENTORY

Q27 What are the motivating factors for cycle count and inventory management?



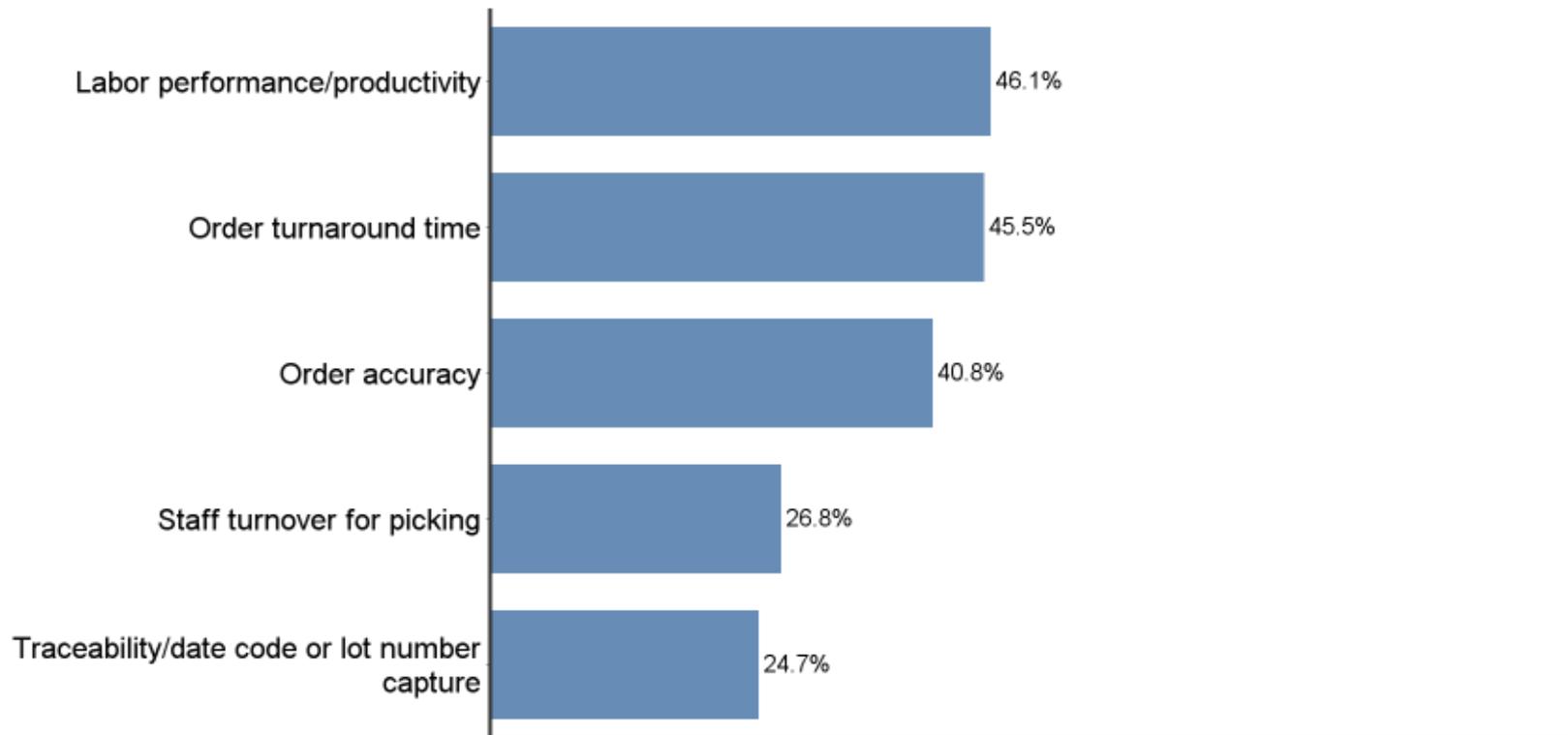
MOTIVATION FOR CYCLE COUNT/INVENTORY

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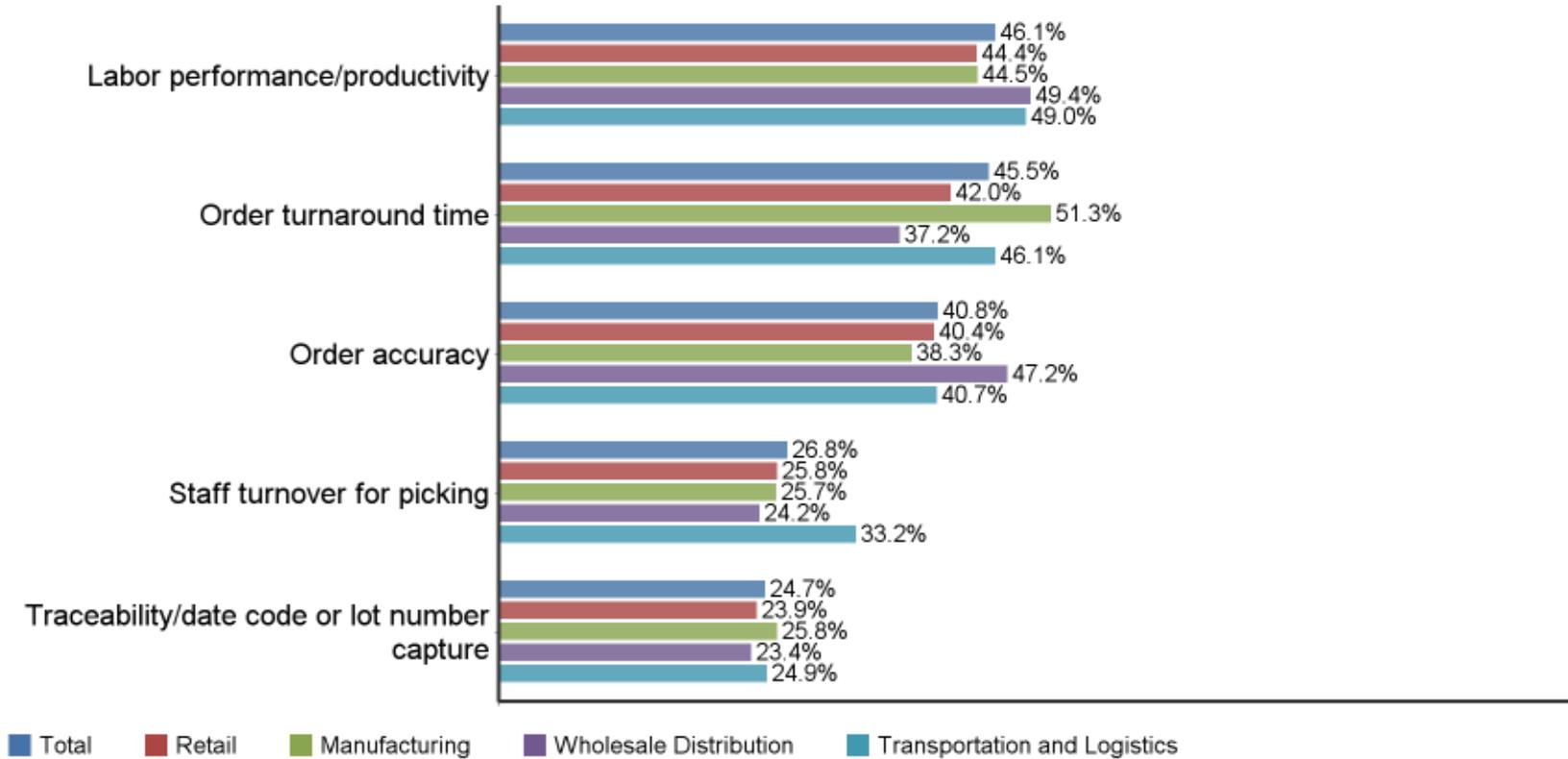
PICK & FULFILLMENT ISSUES

Q28 What are biggest issues today for order pick & fulfillment?



PICK & FULFILLMENT ISSUES

What are biggest issues today for order pick & fulfillment?



AVERAGE HOURS NEEDED TO HIT PRODUCTIVITY

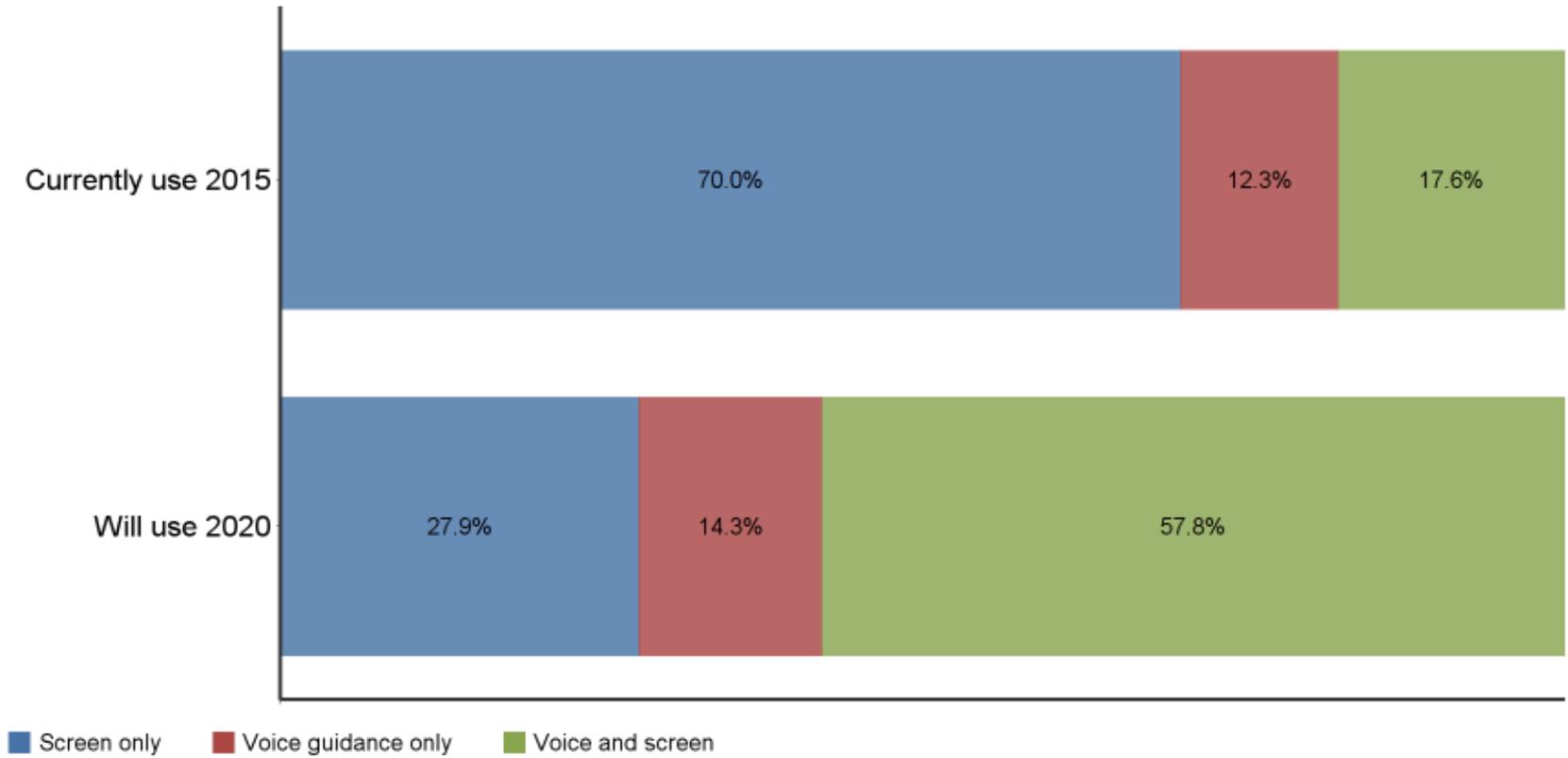


How many hours does it typically take for new staff to hit full productivity?

How many hours would you like for it to take to get new staff to hit full productivity?

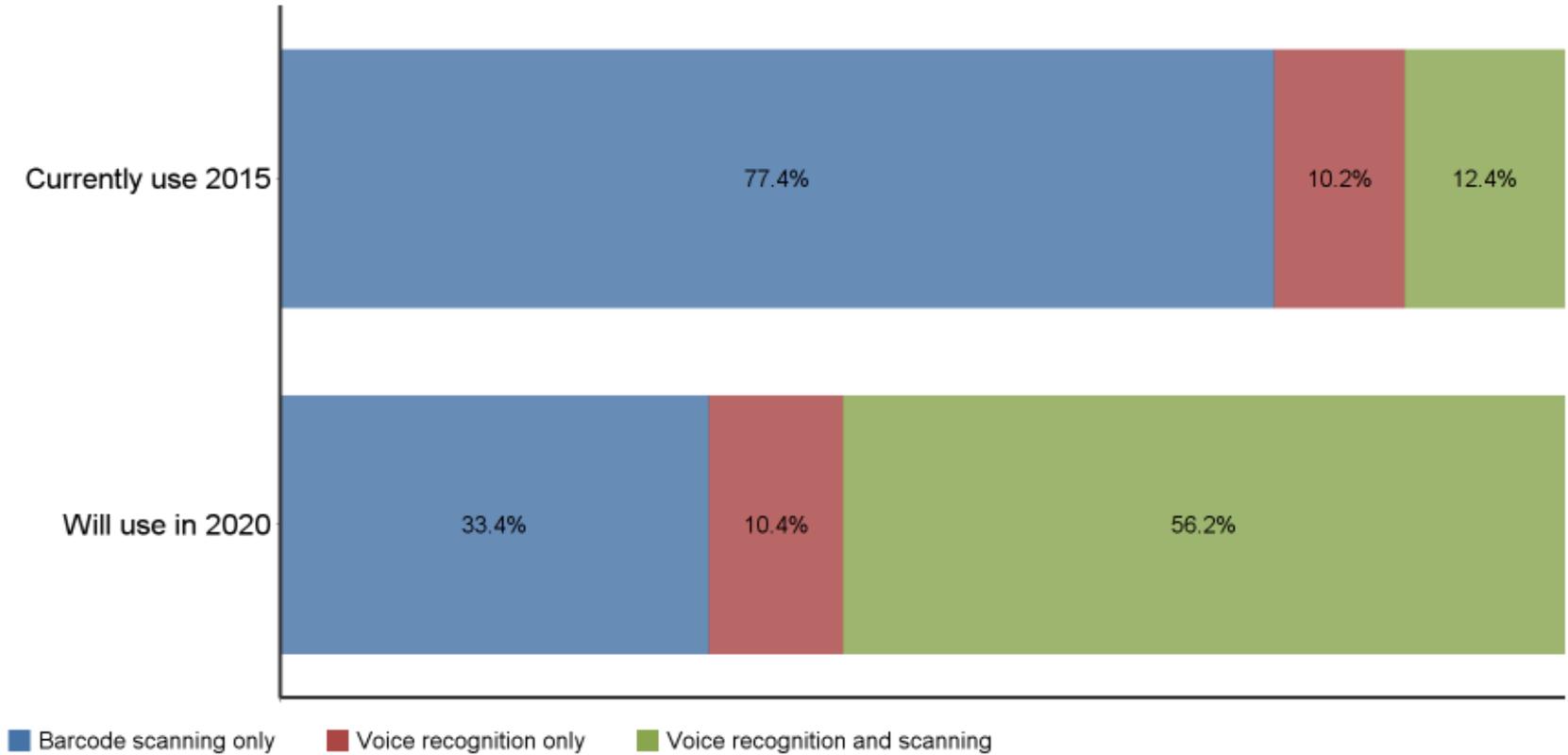
VOICE PICKING IS INCREASING AS INPUT TO USER

Q31 What level of voice picking is in use today as input to user? What do you anticipate it to be in 2020?



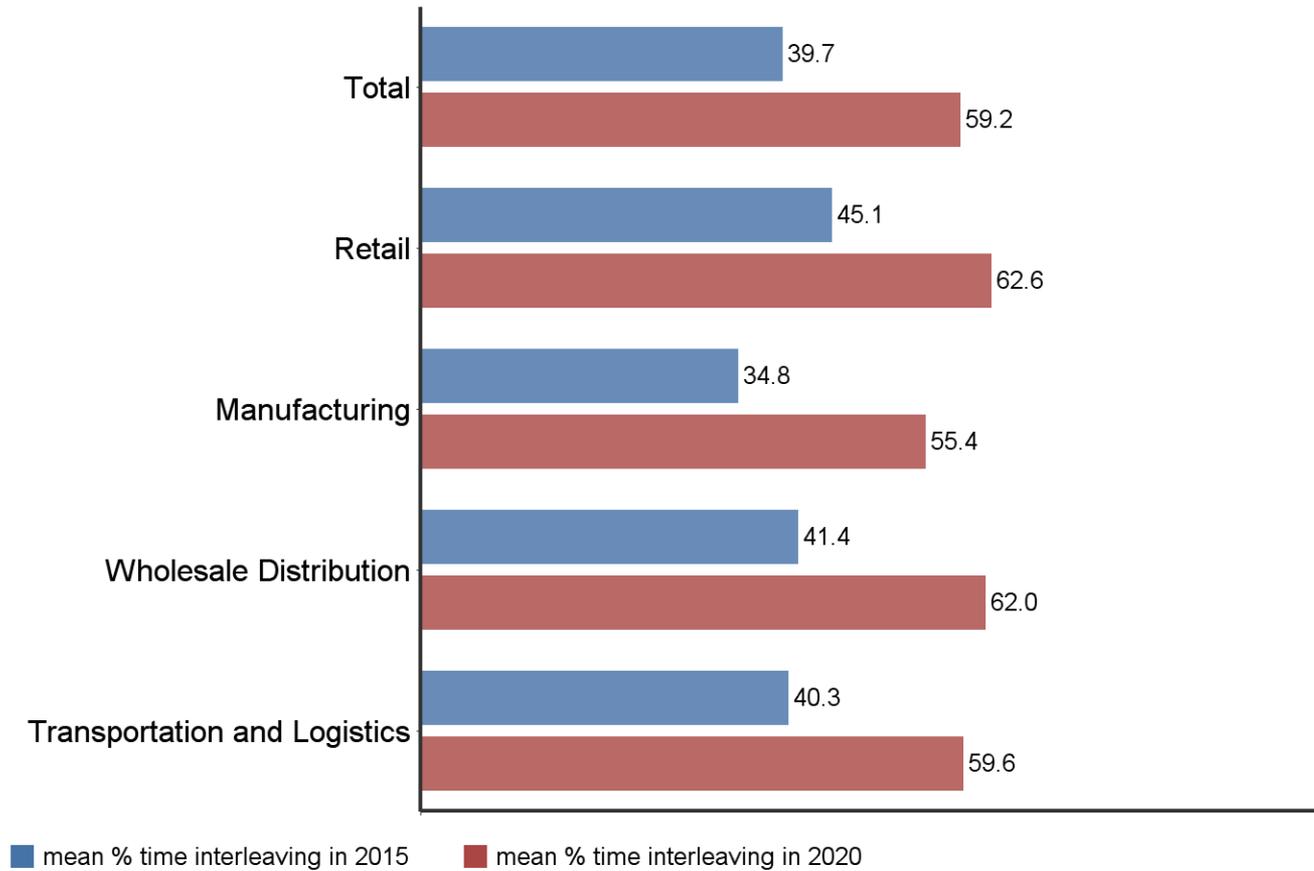
VOICE PICKING INCREASING FOR DATA CAPTURE

What level of voice picking is in use today as for data capture? What do you anticipate it to be in 2020?



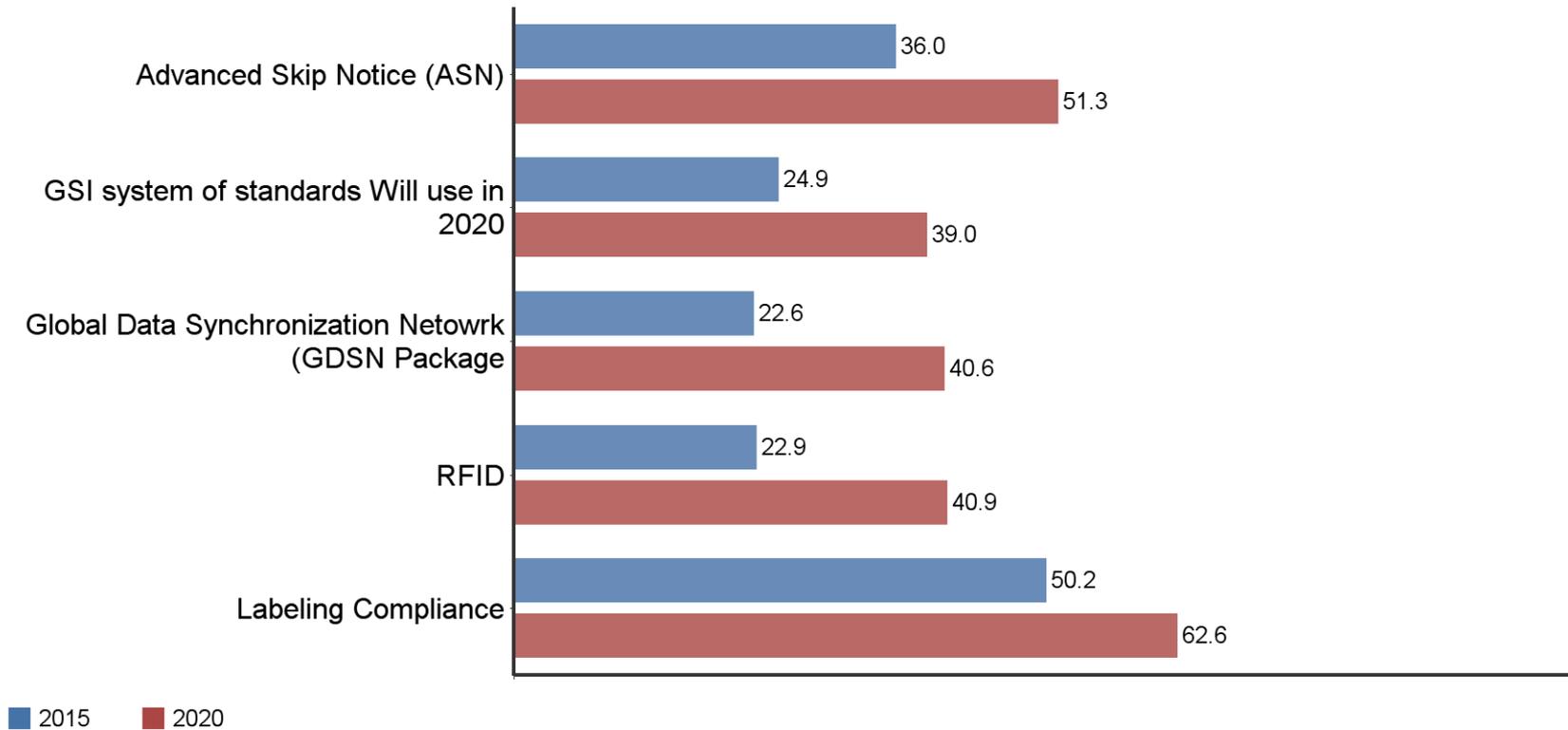
USAGE OF TASK INTERLEAVING INCREASING

Q32 To what extent do your warehouse management systems drive "task interleaving" (The ability to assign tasks to workers in the optimum way considering their location, equipment, and task priority)?



CUSTOMER REQUIREMENTS

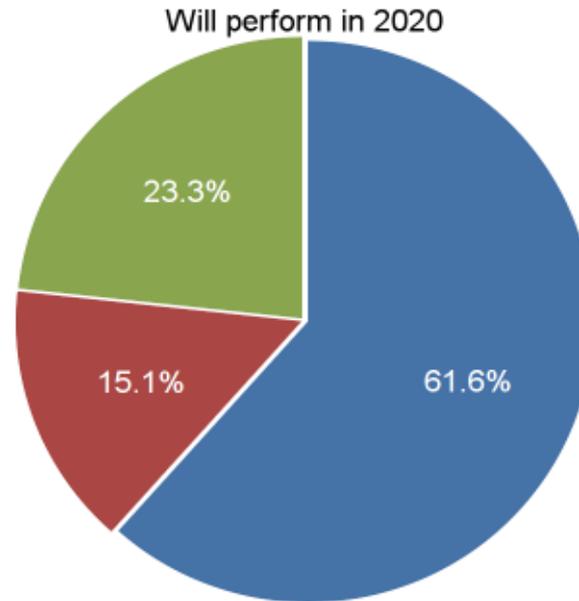
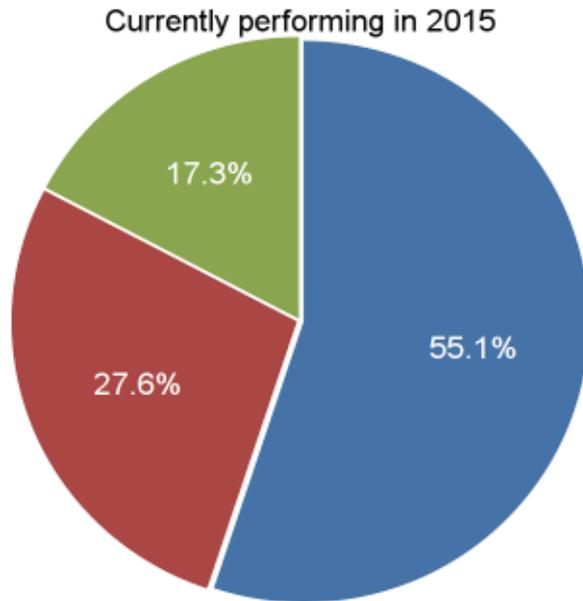
Q25 What percentage of your current customers requires adoption and use of the following? And what do you anticipate it will be in 2020?



NEED FOR LOAD OPTIMIZATION AND PERFORMANCE MONITORING

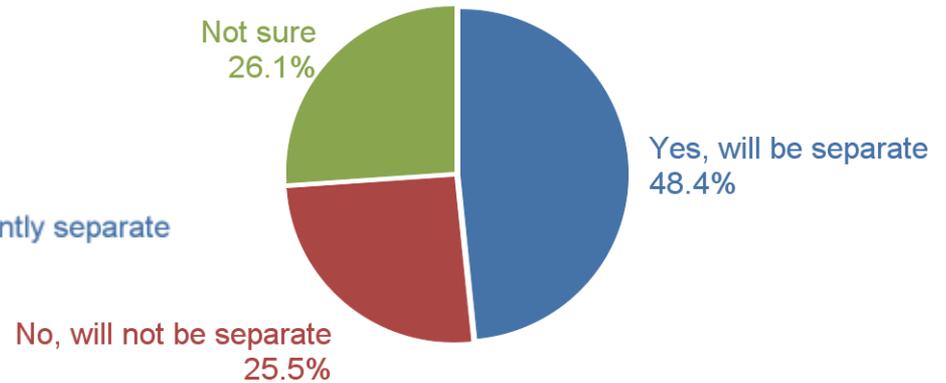
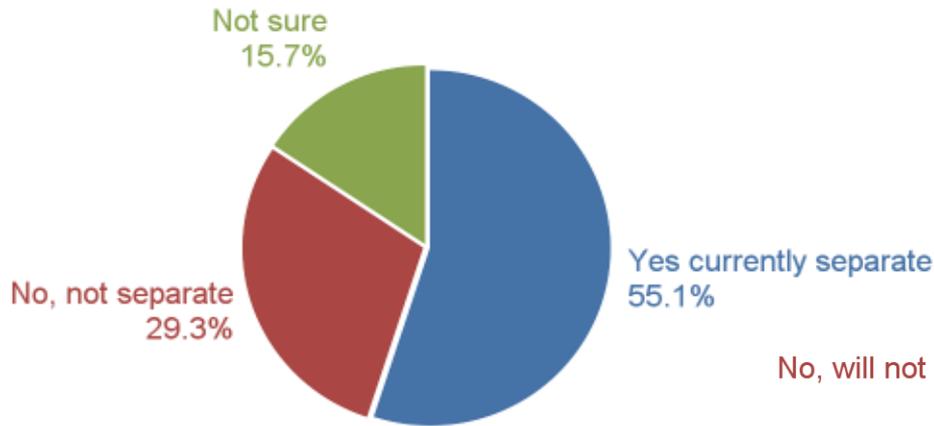
Q35 Are you currently performing load optimization and performance monitoring? And do you anticipate you will be performing load optimization and performance monitoring by 2020?

■ Yes ■ No ■ Not sure



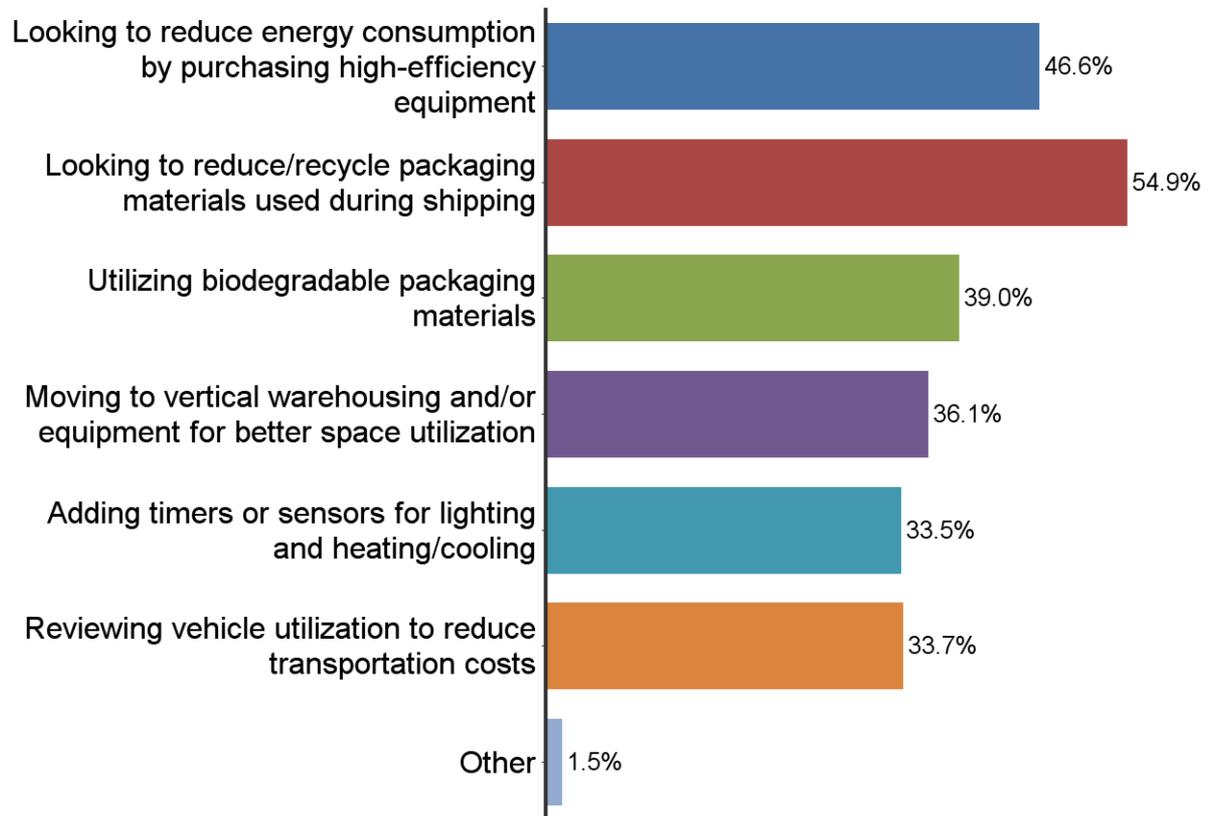
RETAIL: D2C FULFILLMENT WILL REMAIN SEPARATE

Q36 Is D2C (direct to consumer) fulfillment currently separate from store replenishment? By 2020, will D2c (direct to consumer) fulfillment be separate from store replenishment?



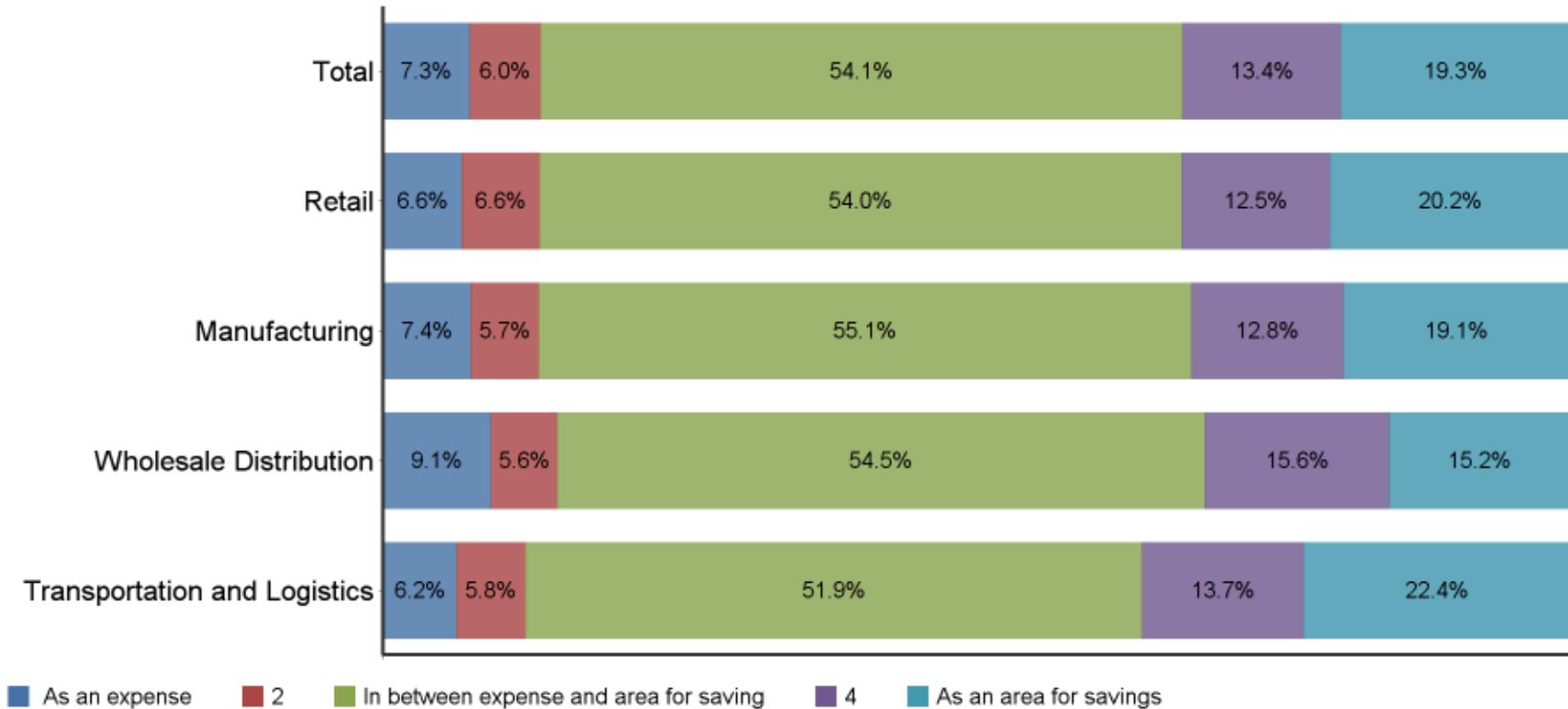
GREEN INITIATIVES IN PLACE TODAY

Q52 Do you currently have any of these green initiatives in place today?



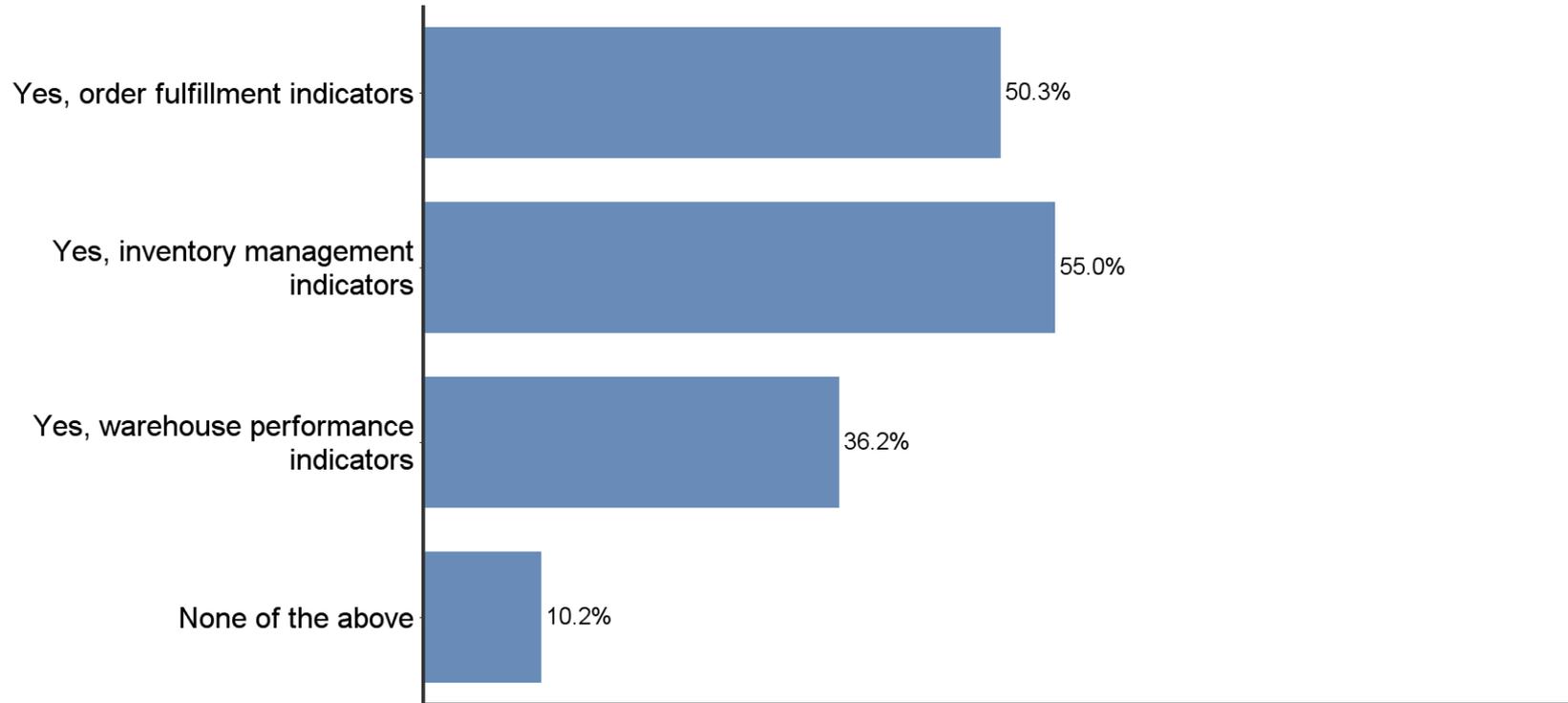
MANAGEMENT VIEW OF SUSTAINABILITY

Q53 How does your company management view your given green initiatives and sustainability?



USAGE OF KPIS

Q54 Do you use key performance indicators to measure efficiency of order fulfillment, inventory management, and/or warehouse performance to assess the effectiveness of your operations?



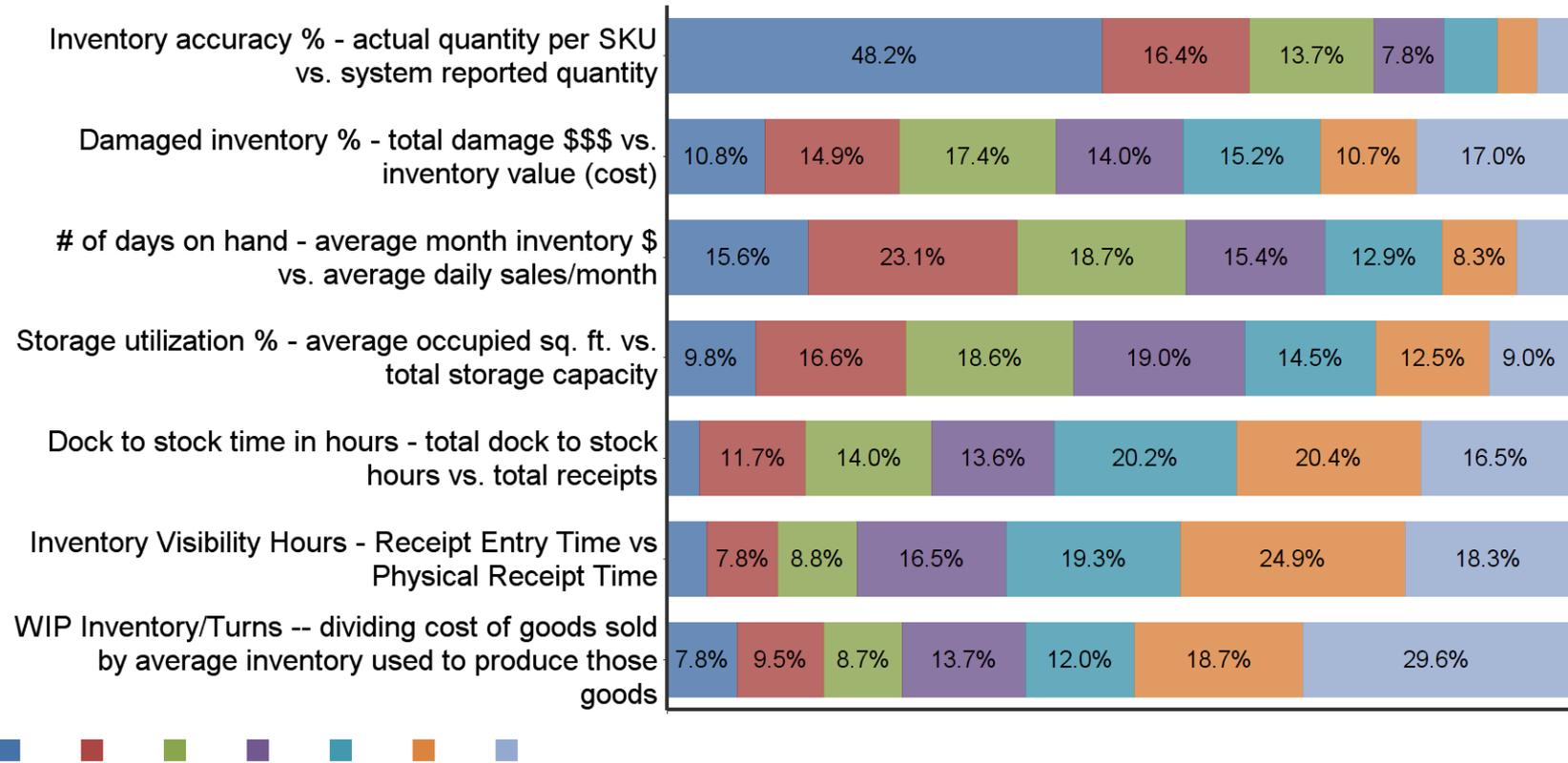
ORDER FULFILLMENT METRICS

Q55 Please rank the following metrics in importance for order fulfillment



INVENTORY MANAGEMENT METRICS

Q56 Please rank the following metrics in importance for inventory management



WAREHOUSE PERFORMANCE METRICS

Q57 Please rank the following metrics in importance for warehouse performance metrics

