

Warehousing & Logistics Company – ERP Case Study

Key Takeaways:

- A midsize warehouse and logistics company hired RubinBrown to guide them through the assessment, selection, and implementation of new ERP package.
- The client had already invested in automation solutions, but needed to procure warehouse management software, transportation management software, and a new financial suite.
- Due to the nature of their work, the client required a seamless transition so as not to impact their customers.
- The client selected three new software systems. Implementation occurred on schedule and within budget without disrupting the customer experience.

Client:

A midsize warehousing and logistics company on the East Coast, made up of 400 employees, engaged RubinBrown to guide and support a business optimization and transformation initiative. Specifically, the company desired an ERP package that could provide an improved level of functionality from their current segregated platforms.

Challenge:

One aspect that makes this company unique is it builds its own facilities and concrete tilt-up warehouses, which allows it to physically scale to meet their clients' needs. The direction in which the business was moving, at the time of RubinBrown's engagement, changed the focus and level of expense from dry warehouses with pallet racking to far more complex and capital-intensive facilities with cold storage and automated retrieval and put-away systems, which improve density and efficiency.

Automatic warehousing and retrieval solutions had already been selected and implemented prior to engaging RubinBrown due to the fact that their ambient and cold storage facilities required automated pick and pack operations. The client also runs a considerable fleet of its own dry and refrigerated trailers pulled by its own tractors and hauled for third parties to optimize their freight asset utilization. Furthermore, its client base, which includes a large global food manufacturer, is diverse and requires significant and complex EDI transactions for all elements of their relationships.

The company found their existing business applications cumbersome in supporting the growth and informational requirements of its expanding business model. They knew they needed a third-party partner specializing in ERP systems to help them choose and successfully implement new ERP software.

Specifically, the client wanted RubinBrown's guidance to ensure the ERP implementation would improve the client's:

- supply chain scalability
- inventory tracking and inventory management
- information visibility without manual intervention
- workflow management

Lastly, it was crucial to the client that customer satisfaction would in no way be negatively impacted by the implementation. There was no room for error due to the demands of their customer's order fulfillment commitments.

Actions:

- Conducted an operational and needs assessment reviewing the firm's current state and defining a functional model, including business process mapping.
- Built a foundation for the project supported by improvement benefits, best practices, and value structures.
- Developed and finalized software specifications, edge solutions, and integrations.
- Defined vendor selection criteria and weighting factors to evaluate vendor responses.
- Executed and facilitated vendor workshops.
- Assisted the client in determining the best vendor to select.
- Assisted with contract negotiations between the firm and their vendor of choice.

Solution:

The company selected Blue Yonder as their new warehouse management system (WMS), Trimble as their new transportation management system (TMS), and Microsoft Dynamics as their new financial and accounting software.

Results:

RubinBrown started the project in 2021, and selection of the three new systems occurred in May of 2022. Since go-live in 2023, the client has experienced improved inventory accuracy, real-time visibility into their supply chain data, acceptance of the new ERP solutions by the workforce, and improved customer satisfaction. Their team members have also experienced improved morale due to the new features the software implementations have afforded them on the job, increasing productivity and enabling them to make data-driven decisions.