

FORTNA

Thought Leadership Series

# Keys to Unlocking Successful Operational Readiness



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Labor shortages, booming product variety (SKU proliferation), and ever-evolving customer demands are forcing a critical shift. Automating your distribution processes, from pinpoint aspects to the entire supply chain, is no longer a future dream; it's an immediate necessity. This requires a deep dive into your organization's current state: infrastructure, staffing and skillsets. **Operational readiness, the bedrock for a successful automation journey, is not just essential; it's crucial** to ensuring a robust plan, project execution and seamless integration.

FORTNA, with its extensive experience and expertise in warehouse operations, recently conducted a comprehensive survey among 100 team members, including executive leadership, project engineers, data scientists, project managers, product managers, and system integration specialists. We sought their unique perspectives on operational readiness across all organizational levels. This survey explored how our experts have firsthand experience with operational readiness and their insights into what makes automation projects genuinely successful.

In this FORTNA Insight, we will review operational readiness topics through the lens of our experts' valuable vantage points, identify the three pillars of operational readiness, and discuss best practices and the pitfalls to avoid.

## What is Operational Readiness?

Operational readiness in the context of warehouse operations is a collaborative process that refers to the state of preparedness to implement automation, technology and software effectively. It is a variable state that requires a comprehensive understanding of the organization's capabilities and the necessary steps to bridge the gap between the current and future states.



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“The landscape for warehouse automation has changed significantly over the past few decades, migrating from manual operations to automation and now to robotic automation. Software has become more feature-rich to orchestrate mixed operations that include all these operating models in combination to meet the needs of consumers in an always-on world. As new technologies emerge, transitioning to them necessitates a revamped approach to pre-go-live, go-live, and post-go-live phases to ensure efficient ramp-up and equip teams with the skill sets to tackle daily challenges. Operational readiness is the key to achieving optimal team performance in a shorter time horizon.”

**Rob McKeel**  
CEO of FORTNA

## The FORTNA 3 Pillars of Operational Readiness

When examining the wide-ranging responses from our team members who have experienced operation readiness from different perspectives and viewpoints, commonalities and themes began to emerge that defined the FORTNA three pillars of operational readiness.

### **Operational Development**

Assessing current procedures, designing a new operational and fulfillment process, and implementing the new system within the four walls of the warehouse can be complex. Developing a data-backed, best-fit automation plan that fits organizational goals and needs now and into the future is key. It is also vital to ensure that networks, software and automated solutions are flexible and scalable to react to market forces, disruptions and opportunities. Working with a supply chain partner like FORTNA, who has experience automating and integrating distribution operations, can help you develop, plan and execute the right solution for your operations.

### **Change Management**

As one of our respondents mentioned, “Change is hard. Workers, managers and executives need to know the ‘why’ or the reason for the change.” Understanding the cultural shift that will occur when moving to an automated process can help organizations better prepare and support their workers as they adopt new technologies and work processes. Change management can be challenging as workers will be pushed out of their comfort zones, need to learn new technology and processes and be concerned with job security. Addressing these issues transparently and systematically will ensure employees understand the why of the change and how it will affect them.

### **Maintenance and Support**

As a new automated solution goes live, the system will need a new focus on maintenance and technical support. New technologies will require new skill levels, maintenance schedules, spare parts and overall support. Remembering that go-live is just the beginning of the automation journey, it is important to prepare for the next chapter.



## Operational Readiness Best Practices

Our survey covered many different subjects related to operational readiness; however, the FORTNA team was passionate about identifying best practices and how to institute them. After evaluating our experts' answers, we found the top five operational readiness best practices to be:

### **1) Transparent Communication**

An integration manager for FORTNA had an interesting take on organizational communication. "There is no such thing as 'need to know' information regarding operational readiness. Any change will affect the operation in some way, so transparent and thoughtful communication is a must."

This communication aims to foster an adoption environment and lessen resistance to new processes. By including all teams, there should be minimal surprises and anxiety for teams and help the operation team resist the urge to return to the old ways of doing things.



### **2) Earlier Participation and Inclusion**

The inclusion of different internal teams with the project goes hand-in-hand with communication. Including operational and support teams earlier in the project will help drive a deeper understanding of the new system, knowledge of roles and responsibilities, and ownership of the new system. Participation in testing, system ramp-up, exposure to software and process planning can result in a smoother implementation.

### **3) Transition Management**

Transition management is critical for workers and operators as they go from a highly manual process to an automated one. Managing team and employee expectations by defining their new duties and responsibilities in detail can alleviate stress and speed adoption. Understanding that there will be a natural resistance to moving away from “the way we have always done it” to a new process can help managers and supervisors address and overcome these issues earlier in the process. In addition to in-person, hands-on training complemented with standard operating procedures (SOPs) written in an operationally friendly form can help get employees on board and dispel preconceived perceptions about the project.

### **4) Impactful Training**

Respondents mentioned training beyond the classroom numerous times. This best practice involves customized training for the new system on not only the new equipment, technologies and software but also hands-on training on processes, device and scanner use, and worker safety. Our experts encouraged training from external sources to gain manufacturer and integration-level knowledge and internally driven training on operational processes, which can drive adoption and ownership.

### **5) Readiness Checklist**

Working with a supply chain partner like FORTNA, which has experience and expertise in integrating new automated solutions, a thorough and extensive checklist can guide the customer and partner to ensure that all tasks, tests and materials are checked off and ready for go-live. A supply chain partner that has experience in integration and automation will be able to design a detailed checklist to measure progress and needs.

## **Operational Readiness Pitfalls to Avoid**

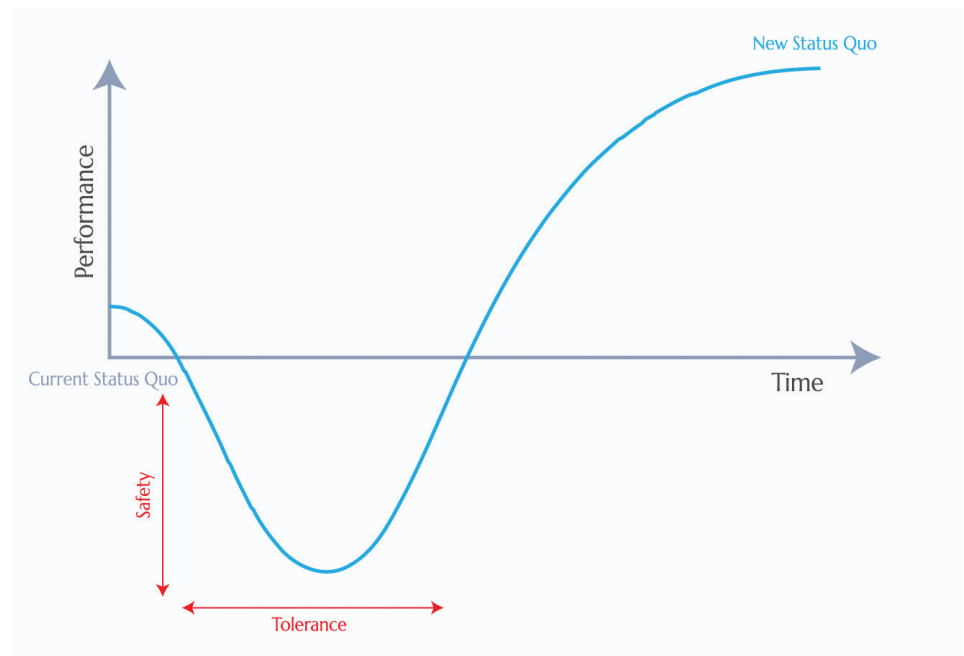
While identifying best practices, our team also provided details on pitfalls warehouse distribution operations want to avoid.

### **1) Internal Benchmarking**

At the beginning of an automation project, there is a temptation to perform the data gathering and benchmarking process internally instead of having a third-party partner like FORTNA do an operational assessment. While an organization will have strong knowledge and connection to the business, an unbiased examination of the operation, current processes, and equipment can unveil previously unrecognized shortcomings and opportunities for improvement. An assessment can confirm and challenge current beliefs and create a data-backed starting point for key performance indicators (KPIs) that can help measure success in the future.

## 2) Not understanding the J-Curve

The J-Curve is a diagram that shows an initial dip in performance following a change or integration of new technologies before a recovery to and beyond the system's original performance.<sup>1</sup> It shows an initial decline due to resistance to change, adapting to new processes or disruptions, a recovery period as performance improves, and optimal improvement beyond the original operation. Understanding that this principle comes into play with most changes to an operation can help set expectations across the organization and institute best practices.



## 3) Reducing the testing timeline

As organizations see the new system approaching its go-live, there is a natural impulse to shorten testing and commissioning to get to go-live faster. Many of our experts have experienced this practice, often leading to issues that would have been found and remediated in a testing environment. When testing is rushed, easily fixed obstacles become compounded as they are now found and mitigated during production.

## 4) Bringing in new employees and skill sets late in the project

Many of our on-the-floor engineers and project leaders recognized that organizations try to synch bringing new employees into the operation too close to the go-live date. This does not give them adequate time to get up-to-speed on all tasks and procedures and get comfortable with operating the new system. Bringing these new employees in earlier can pay dividends and lead to a more confident and ready-to-go operations team.

<sup>1</sup> <https://getnave.com/blog/j-curve-effect/>

Operational readiness is undergoing a seismic shift. Organizations need to train their workforce to become collaborators, not just operators. This doesn't mean replacing employees but empowering them in a newly automated environment. Real-time workflow management and visibility tools provide unprecedented control to anticipate challenges and optimize workflows. By leveraging AI-powered decision-making, companies can unlock a new level of agility and responsiveness, allowing teams to capitalize on opportunities and navigate disruptions within the warehouse with unprecedented speed and accuracy.

“There is no such thing as ‘need to know’ information regarding operational readiness. Any change will affect the operation in some way, so transparent and thoughtful communication is a must.”

**Integration Manager, FORTNA**

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# FORTNA

## FORTNA CAN HELP

Designing and creating an automated solution for your operation is only one facet of automating a distribution warehouse. Understanding the facility, staff, and infrastructure flexibility and limitations can be just as important as the needed solutions and improvements. Partner with FORTNA to gain access to our team of engineers, project professionals and integration experts to ensure that your business is operationally ready for automation.

Contact us today at [www.FORTNA.com](http://www.FORTNA.com)