

The Demo Day Question Playbook

The questions that make every WMS vendor prove it, on your own data. Plus how to read the answers, live. Score up to three platforms side by side, then share the summary with your team.

STEP 1 · PICK YOUR TOP 1 TO 2 CHALLENGES

Revenue leakage / billing

Frequent workflow changes

Strict compliance / cold chain

Multi-site reporting

Scaling clients & sites

Replacing a legacy WMS

STEP 2 · NAME THE PLATFORMS ON YOUR SHORTLIST

PLATFORM 1

PLATFORM 2

PLATFORM 3

1 Billing & revenue capture

Value-added work that isn't captured is margin that quietly disappears.

ASK THIS

“Run one of our real client contracts through your billing engine live, including accessorials, kitting, catch-weight, and VAS. Show us the invoice it produces.”

A STRONG ANSWER SHOWS

- ✓ Every billable task captured automatically, as it happens
- ✓ Per-client contract rules, no manual reconciliation
- ✓ Catch-weight handled natively

LISTEN FOR

- ! “Export to your accounting system” sold as capture
- ! A spreadsheet step in the middle
- ! A new accessorial that needs a developer

Vendor A

Strong

Follow-up

Concern

Vendor B

Strong

Follow-up

Concern

Vendor C

Strong

Follow-up

Concern

2 Workflow configuration

Your next onboarding is already booked. Every vendor-engineering dependency is a delay and a line item.

ASK THIS

“Configure a new client workflow live, right now. Who does this in production, and does it need your engineers?”

A STRONG ANSWER SHOWS

- ✓ Your own team configures it, low-code
- ✓ Minutes, not weeks, and no dev ticket
- ✓ Ships without a vendor release cycle

LISTEN FOR

- ! “We’ll scope that as a customization”
- ! A change-request queue for routine edits
- ! Professional-services hours for a tweak

Vendor A

Strong

Follow-up

Concern

Vendor B

Strong

Follow-up

Concern

Vendor C

Strong

Follow-up

Concern

3 Regulated inventory & traceability

In cold chain, pharma, food, or precious metals, traceability is either native or bolted on.

ASK THIS

“Show lot/serial and temperature traceability on a real SKU, then produce the audit trail an inspector would ask for.”

A STRONG ANSWER SHOWS

- ✓ Native lot/serial + temperature capture at control points
- ✓ Catch-weight and audit trail on demand
- ✓ Functionality that may support FSMA, DSCSA & 21 CFR Part 11 efforts

LISTEN FOR

- ! Traceability that's really an add-on report
- ! Audit prep that's manual
- ! “We can build that” for a core requirement

Vendor A

Strong

Follow-up

Concern

Vendor B

Strong

Follow-up

Concern

Vendor C

Strong

Follow-up

Concern

4 Reporting across clients & sites

A committee decision needs numbers everyone can see, per client and across every site.

ASK THIS

“Walk us through client-level reporting across multiple warehouses, in real time.”

A STRONG ANSWER SHOWS

- ✓ Client-specific, multi-site, real-time in one view
- ✓ Consistent inventory across sites
- ✓ Self-serve, no BI project

LISTEN FOR

- ! Nightly batch only, no live view
- ! Single-site reports stitched by hand
- ! Every custom report routed back to the vendor

Vendor A

Strong

Follow-up

Concern

Vendor B

Strong

Follow-up

Concern

Vendor C

Strong

Follow-up

Concern

5 Scalability & pricing

The platform should cost less per unit as you grow, not more.

ASK THIS

“Map your pricing to our growth: more clients, users, and volume. Any per-client fees? What triggers the next increase?”

A STRONG ANSWER SHOWS

- ✓ Transparent, predictable pricing model
- ✓ Adds clients without custom development
- ✓ TCO holds as the client count climbs

LISTEN FOR

- ! Per-client fees that scale steeply
- ! Implementation or module costs that surface late
- ! Pricing you can't map to your growth plan

Vendor A

Strong

Follow-up

Concern

Vendor B

Strong

Follow-up

Concern

Vendor C

Strong

Follow-up

Concern

6 Implementation & references

Rollouts run long on data, integrations, and change management. Rarely the software itself.

ASK THIS

“Give us a timeline mapped to our data and integrations, and references from operations like ours.”

A STRONG ANSWER SHOWS

- ✓ Timeline accounts for data, integrations, change mgmt
- ✓ References from similar multi-client, regulated 3PLs
- ✓ Staged migration, not a big-bang cutover

LISTEN FOR

- ! A timeline that ignores integration complexity
- ! No comparable references
- ! Vague answers on data migration

Vendor A

Strong

Follow-up

Concern

Vendor B

Strong

Follow-up

Concern

Vendor C

Strong

Follow-up

Concern

NOT SURE WHERE TO START? BEGIN WITH YOUR REALITY

If you invoice by temperature zone or catch weight

Start with cards 1 + 3

If your next onboarding is already booked

Start with card 2

If you're replacing a legacy or homegrown WMS

Start with cards 6 + 4

Your live summary

Updates as you rate each vendor. S = Strong, F = Follow-up, C = Concern.

Vendor A

0

Strong

0

Follow-up

0

Concern

No ratings yet.

Vendor B

0

Strong

0

Follow-up

0

Concern

No ratings yet.

Vendor C

0

Strong

0

Follow-up

0

Concern

No ratings yet.

Put your toughest client setup in front of every vendor.

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Vendor-neutral tool. Ask the same questions of every platform on your shortlist. Compliance features may support regulatory efforts; customers remain responsible for validating any system for their intended use. Sources: Datex evaluation framework; PwC 2025 Digital Trends in Operations.

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