

Warehouse & Distribution Strategy Playbook

A practical guide for evaluating warehouse capacity, 3PL fit, inventory visibility, fulfillment, distribution, and freight-connected operating models.

3PL warehouse fit

Inventory visibility

Distribution planning

Freight handoffs



Prepared by Newl

QUICK DIAGNOSTIC

Should you change your warehouse or distribution model?

Use this page to identify whether the issue is capacity, workflow, visibility, location, freight coordination, or partner fit.

FIT SIGNALS

- ☐ Inventory is stored where it is cheapest, not where it supports customer demand.
- ☐ Order flow is split across Amazon, retail, wholesale, ecommerce, and B2B channels.
- ☐ Teams are waiting on spreadsheets, status emails, or manual counts to make decisions.
- ☐ Receiving, labeling, pick/pack, routing, or FBA prep is creating delays or chargebacks.
- ☐ Ocean, air, ground, cross-border, or local trucking is booked separately from warehouse readiness.
- ☐ Current 3PL conversations focus on rate cards before understanding the operating model.

WHAT GOOD LOOKS LIKE

Inventory position

Products sit close enough to customers, carriers, ports, and sales channels.

Warehouse workflow

Receiving, storage, labeling, fulfillment, returns, and reporting are defined before launch.

System visibility

Customers can see inventory, inbound, orders, exceptions, and reporting without chasing updates.

Freight connection

Transportation is planned around warehouse staging, dock timing, and release requirements.

Rule of thumb

If the warehouse problem touches service levels, inventory visibility, chargebacks, Amazon storage pressure, cross-border movement, or freight handoffs, evaluate the whole operating model before choosing another warehouse.

DECISION FRAMEWORK

Five decisions to make before selecting a warehouse partner.

1 Know the real warehouse problem

Separate symptoms from operating causes so the solution is not just more space.

SKU count and velocity

Pallet/carton profile

Inbound and outbound cadence

2 Decide where inventory should sit

Map customers, suppliers, ports, sales channels, and cross-border movement before choosing location.

Customer geography

Port and supplier lanes

Canada-U.S. coverage

3 Define the warehouse workflows

Document the daily work the warehouse must perform before agreeing to a rate card.

Receiving rules

Order channels

Labeling and compliance

4 Require visibility before launch

Make sure inventory, inbound, orders, reporting, and exceptions are visible from day one.

WMS access

Cycle count process

Exception reporting

5 Connect freight to inventory

Plan ocean, air, ground, local trucking, and cross-border movement around warehouse readiness.

Dock handoffs

Carrier coordination

LTL/FTL or final-mile needs

INVENTORY PLACEMENT

Decide where inventory should sit.

Warehouse location is a service decision, not just a real estate decision. Start with customers, suppliers, ports, sales channels, and cross-border movement.

Questions to answer

- ☐ Where are your top customers by order volume and delivery urgency?
- ☐ Which suppliers, ports, or inbound lanes drive receiving pressure?
- ☐ What inventory should sit in Canada, the U.S., or both?
- ☐ Which SKUs need to be closer to Amazon, retail, wholesale, or ecommerce demand?
- ☐ What seasonal or peak inventory should stay outside constrained channels?

NEWL LENS

Two-hub planning

Mississauga and Charlotte can support Canada, U.S., and cross-border inventory models.

Warehouse plus freight

Inventory placement should account for ocean, air, ground, local trucking, and cross-border handoffs.

Channel control

The warehouse model should support marketplace, retail, wholesale, B2B, and ecommerce stock without constant conflict.

WORKFLOW DESIGN

Define the warehouse work before choosing the warehouse.

A warehouse program is only as strong as the workflows behind it. Define the operating rules before launch so storage, fulfillment, compliance, and reporting do not become surprises.

Questions to answer

- ☐ What happens when inbound freight arrives?
- ☐ What are the receiving, inspection, labeling, and putaway rules?
- ☐ Which channels require pick/pack, FBA prep, case picks, pallet orders, or retail routing compliance?
- ☐ What reporting, cycle count, and exception processes are required?
- ☐ Who owns customer communication when something falls outside the normal workflow?

WORKFLOW AREAS

Receiving and staging

Define how freight is checked, labeled, documented, and moved into available inventory.

Fulfillment rules

Set requirements for B2B, ecommerce, Amazon FBA, retail, wholesale, returns, and replenishment.

Visibility

Use WMS access and reporting to reduce spreadsheet chasing and status emails.

FREIGHT CONNECTION

Connect freight to warehouse readiness.

Transportation should not be planned after the warehouse work is already late. The right plan connects carrier decisions to receiving, staging, documentation, dock timing, and final delivery needs.

Questions to answer

- ☐ Which inbound modes feed the warehouse: ocean, air, ground, cross-border, or local trucking?
- ☐ What freight needs devanning, transloading, cross-docking, or staging?
- ☐ Which outbound moves need LTL, FTL, local trucking, retail appointments, tailgate service, or commercial delivery?
- ☐ Where do documents, labels, customs handoffs, or routing guides create risk?
- ☐ How will shipment status and exceptions be communicated?

FREIGHT-TO-WAREHOUSE MODEL

Before arrival

Plan receiving capacity, documents, dock timing, and inventory handling before freight lands.

During handoff

Stage and verify pallets, cartons, labels, and paperwork before carrier or fleet release.

After release

Coordinate ground distribution, local trucking, cross-border movement, and delivery requirements.

PARTNER SCORECARD

Score warehouse partners on the operating model, not only the rate card.

Use a simple 1 to 5 score for each area. A strong partner should be able to explain how the work will run, not just where the inventory will sit.

AREA	WHAT TO EVALUATE	SCORE
Facility fit	Capacity, equipment, dock access, location, expansion path	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Workflow fit	Receiving, storage, pick/pack, FBA prep, routing, returns	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Visibility	WMS access, reporting, inbound/order visibility, exceptions	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Freight connection	Ground, ocean, air, local trucking, cross-border handoffs	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Compliance	Labeling, retail routing, pallet standards, documentation	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Communication	Account ownership, response time, escalation path	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Scalability	Seasonal spikes, channel growth, new customer requirements	☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Decision prompt

If a provider scores well on space and pricing but poorly on workflow, visibility, freight coordination, or communication, the savings may disappear in delays, chargebacks, labor friction, and inventory uncertainty.

APPLY THE PLAYBOOK

Need a warehouse-led logistics recommendation?

Newl helps importers, manufacturers, distributors, ecommerce brands, Amazon sellers, and retail suppliers evaluate warehouse fit, inventory visibility, fulfillment workflows, distribution requirements, and freight-connected operating plans.

1 Share the problem

Inventory, locations, customer requirements, order channels, freight lanes, and timeline.

2 Review fit

Newl evaluates facility fit, workflows, WMS visibility, distribution, and handoff requirements.

3 Get next steps

Receive a practical path for warehouse setup, service fit, launch timing, and pricing requirements.

Request Assessment

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