



**✓ PRE-INVENTORY**

- Schedule cut-offs (before/after inventory) for movement of material and notify customers, vendors and sub-contractors of inventory date.
- Prepare written inventory procedures and schedule orientation session for all participants.
- Allow for schedule overrun due to system failure, power outage or other disasters.  
A back-up day provides time for recovery.
- Arrange for an MIS staff person to be on-call in the event that a problem develops.
- Run computer back-ups the evening before count begins.
- Perform location audit and input any corrections.
- Perform pre-counts of slow-moving and obsolete product.
- Bag and seal small piece parts for faster counting during inventory.
- If using a min/max recorder system, verify that parts are in a sealed bag with part number, description and quantity clearly marked to eliminate opening the package.
- Print inventory sheets/tags by location in part number sequence. If using inventory sheets, configure so that sheets break at end of each location. Maintain a control log for preprints and handwritten tags/sheets.



**✓ WAREHOUSE**

- Make sure that:
  - Items to be counted have correct part number and description
  - Overstock, bulk and skids have correct part number identification
  - All areas to be counted are marked with a location
- If scales are used we suggest a minimum sample size of 20 pieces, depending on part weight and scale capacity. Provide scale instructions to count personnel.
- Identify partial cartons and consolidate material where possible.
- Flag items which are not to be counted with a “DO NOT INVENTORY” sign.
- Check for equipment and supply requirements: calculators, clipboards, ladders, labels, pens, pencils, counting scales, material handling equipment and operators.
- Notify vending machine company and advise of heavier use during inventory.
- Stock restrooms with essentials.

**✓ PERSONNEL**

- Advise housekeeping not to sweep area or remove trash until inventory is completed. Combing the dumpster for a missing tag or sheet is no fun!
- Inform supervisors of light switch and thermostat locations.
- Notify security of inventory schedule and access requirements. Advise of any visiting personnel.

**✓ POST-INVENTORY**

- Do a thorough walk through with inventory manager to verify that all material was counted.
- Send a “thank you” letter to all employees involved with the inventory process expressing your appreciation for their support and diligence.

**✓ NEXT YEAR**

- Call Allied Inventory Company, “The Team That Counts” and take a vacation!