STOCK HANDLERS SOLUTIONS

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Year-End Stock Count Planner

A timeline working backwards from your count date

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Year-end counting concentrates into a few weeks, and the businesses that get a clean count are the ones that started early. Work backwards from your count date and put a name against each row. This is the same sequence Stock Handlers Solutions runs on a year-end engagement.

The timeline

Week	What happens	Who owns it
–8 weeks	Confirm count date with auditor; book external resource if using one	
–6 weeks	Agree scope in writing, including third-party and consignment stock	
–5 weeks	Begin item master clean-up: duplicates, units of measure, descriptions	
–4 weeks	Site assessment; count method, zones and team structure decided	
–3 weeks	Written count instruction issued; recount rules agreed	
–2 weeks	Store consolidation and housekeeping begins	
–2 weeks	Labelling gaps closed; unidentifiable items resolved	
–1 week	Zones mapped and physically labelled; teams assigned	
–3 days	Cut-off plan communicated to every department	
–1 day	Outstanding receipts, despatches, transfers and returns processed	
–1 day	System frozen or snapshot taken; count sheets prepared	
Count day	Briefing, count, supervisor spot-checks, zone sign-off	
Count day	Largest variances recounted before teams leave site	
+1 day	Reconciliation; variances classified	
+3 days	Adjustments documented with reasons; trail to ledger checked	
+1 week	Findings reviewed; process causes identified for next year	

Decisions to record before the day

Decision	Agreed
Count date and window (including whether operations stop)	
Blind count: yes / no, and on which lines	
Recount trigger: value threshold	
Recount trigger: percentage threshold	
Who adjudicates a disagreement between counts	
Locations in scope	
Locations explicitly out of scope, and why	
Treatment of goods in transit	
Treatment of consignment and customer-owned stock	
Auditor attending: yes / no, and sample basis	
Cut-off moment (date and time)	
Where count data is captured and retained	

Book the resource early

Year-end capacity across the whole market gets committed well before December. Whether you use your own staff or an external firm, settle the resourcing question early. Stock Handlers Solutions commits teams on a first agreed, first scheduled basis.