

SMART WAREHOUSING

Control, Count, Optimise

Non-Credit Bearing

"The more inventory a company has, the less likely they will have what they need"

– Taiichi Ohno

Stock only becomes "a problem" when someone urgently needs it: a customer is waiting, a delivery is incomplete, or finance is trying to close the month and the numbers don't add up. In most warehouses, the issue isn't effort, it's inconsistency. A rushed stocktake, unclear bin locations, unlabelled items, or a missed expiry date can quietly turn into shortages, overages, write-offs, and difficult customer conversations.

This course is designed to turn stock control into a calm, reliable routine rather than a high-pressure event. You'll learn what a stocktake is meant to achieve, how to prepare the floor and the system so your count is credible, and how to organise people and movement so that accuracy isn't left to chance. Just as importantly, you'll practise how to spot variances early, investigate them logically, and apply corrective actions that prevent the same problems coming back again and again.

Alongside stocktaking, we focus on stock rotation - the daily discipline that protects quality, reduces waste, and safeguards your reputation. You'll build confidence using FIFO and FEFO, understanding batch numbers and expiry dates, and handling short-dated and slow-moving stock in a structured way. By the end of the course, participants will be able to count safely and consistently, keep inventory records trustworthy, and maintain stock flow that supports both customer service and cost control.

WHO SHOULD ATTEND

- Stock counters, checkers, pickers, dispatch and delivery drivers who want to count and rotate stock correctly every time
- Forklift drivers and warehouse operators responsible for bin-to-bin movement and put-away
- Receiving and goods-in teams handling batch numbers, expiry dates, and documentation
- Supervisors and team leaders who oversee stock accuracy, controls, and accountability
- Anyone involved in audit readiness, shrinkage reduction, or customer fulfilment performance

One-day course 08:30 -16:00

Tel: (031) 267 1229

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HOW YOU WILL BENEFIT

By the end of this course, you will be able to:

- **Develop** a clear understanding of what a stocktake is meant to achieve, so your counts support financial control, availability, and customer service
- **Improve** stock accuracy by applying a consistent counting method that reduces missed items, duplicated counts, and location confusion
- **Plan** stocktakes more effectively through better preparation, including system clean-up, floor readiness, and practical zone/section layouts
- **Strengthen** labelling and bin location discipline to minimise misplacements, speed up counting, and reduce “mystery stock”
- **Clarify** roles and responsibilities so counters, checkers, pickers, drivers, forklift operators, and managers work in sync with fewer handover errors
- **Control** stock movement during counts (where applicable) by understanding freeze rules, exception handling, and how to maintain traceability
- **Spot** variances earlier and interpret what they really mean, so issues are investigated before they become recurring losses or service failures
- **Investigate** shortages and overages more confidently using practical root-cause approaches, including recount rules, document checks, and transaction tracing
- **Apply** corrective actions that prevent repeat variances, improving long-term accuracy rather than relying on frequent adjustments
- **Reduce** shrinkage, write-offs, and waste by improving controls at key risk points such as receiving, put-away, picking, and dispatch
- **Enhance** audit readiness by maintaining cleaner data, clearer records, and stronger evidence of controls during stocktake activity
- **Use** FIFO and FEFO correctly to protect product quality, freshness, and customer expectations across different stock types
- **Handle** batch numbers and expiry dates with greater confidence, improving traceability and reducing the risk of expired or incorrect stock leaving site
- **Manage** short-dated stock proactively through clear identification, prioritised picking, and escalation steps that avoid last-minute write-offs
- **Address** slow-moving stock more strategically by improving visibility, storage decisions, and follow-up actions that reduce ageing inventory
- **Boost** customer satisfaction by improving order accuracy, reducing “out of stock” surprises, and limiting complaints linked to incorrect or expired stock
- **Build** a culture of accountability where stock accuracy becomes a shared operational standard rather than an occasional clean-up exercise

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WHAT WILL BE COVERED

Module 1: Stock Take Training (Inventory Counting)

Getting the numbers right: the purpose of a stocktake

- What a stocktake is and what it is not
- Why stocktakes matter for accuracy, financial control, and customer service
- The real cost of poor stock accuracy: shrinkage, write-offs, and customer complaints

Ready to count: stocktake preparation that prevents chaos

- Pre-stocktake planning: timing, scope, and count strategy
- System clean-up to reduce “ghost stock” and duplicate locations
- Floor clean-up: labelling standards and bin location accuracy
- Freezing stock movement where applicable and controlling exceptions
- Assigning roles, shifts, zones, and escalation contacts

People make it accurate: roles and responsibilities

- Stock counters: counting discipline, double-checking, and handovers
- Checkers, pickers, and drivers: how each role impacts the count result
- Forklift drivers: safe access, bin integrity, and movement control
- Management oversight: verification, spot checks, and progress control
- Accountability rules during stocktake: what gets signed off, by whom, and when

Spot the gap: variance identification and investigation

- What stock variances are and how they show up in operations and reporting
- Types of variances: shortages, overages, and mislocations
- Common causes: picking errors, theft, receiving issues, damage, poor put-away, system timing
- Investigation techniques: recount rules, bin-to-bin checks, document tracing, and transaction review
- Corrective actions: fixes that prevent repeat variances, not just “adjustments”

Cycle Counting Best Theory and Best Practice

- ABC Analysis
- How is it different and what are the benefits?
- Best Practice lessons

Module 2: Stock Rotation Procedures Training

Freshness by design: the purpose of stock rotation

- What stock rotation means in practical warehouse terms
- Why rotation is critical: quality, freshness, cost control, and reputation
- The impact of poor rotation: expiry, waste, rework, and customer complaints

Flow that protects value: FIFO and FEFO principles

- FIFO (First In, First Out): when and how to apply it
- FEFO (First Expiry, First Out): where it is non-negotiable
- Choosing the right approach by product risk, customer expectation, and shelf-life

Labels that matter: batch numbers, expiry dates, and traceability

- Reading and verifying batch numbers and expiry dates accurately
- Storing and picking to protect traceability during high-volume periods
- Common rotation errors and how to prevent them

Short-dated stock: act early and escalate clearly

- Identifying short-dated stock before it becomes urgent
- Handling rules: segregation, prioritised picking, and visibility
- Escalation process for near-expiry items: who to notify and what information to include
- Decision options: reallocation, promotions, returns, supplier engagement, or controlled write-off

Slow-moving items: reduce ageing without disrupting service

- Spotting slow movers and understanding why they stall
- Storage strategy to improve visibility and reduce mis-picks
- Practical actions to reduce ageing stock while maintaining availability