

COMPANION WORKSHEET PACK

Inventory Optimization Techniques

Stock That Sleeps Is Capital That Is Locked

9 Worksheets · 3 Categories · A4 Print-Ready

High-Volume · Niche-Search · Specific-Case

PT Hibrkraft Kreasi Indonesia · hibranwar.com

PART 1

High-Volume Worksheets

Universal worksheets — what most operators reach for daily or weekly. Run these on a regular cadence regardless of business size or stage.

Monthly Slow-Mover Review

Run on the first working day of each month. Source: stock record sorted by date of last sales transaction.

Reorder-Trigger Check — Top 10 Category A SKUs

Use alongside the weekly scan. One row per SKU. Fill from live system or stock card.

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SKU NAME	CURRENT BALANCE (UNITS)	ROP (UNITS)	SAFETY STOCK (UNITS)	ACTION

1. Action column options: HOLD (balance > ROP), ORDER NOW (balance ≤ ROP), URGENT (balance ≤ safety stock). Any URGENT row means the order is already overdue — confirm with the vendor today, not end of week.

2. After filling: compare this week's results against last week's. If the same SKU triggered ORDER NOW two weeks running, the ROP may be understated. Pull the last 30 days of daily sales and recalculate before the next cycle.

PART 2

Niche-Search Worksheets

Rare-situation worksheets — high value when the situation hits. Run these only when the trigger appears, but keep them findable.

End-of-Fiscal-Year Inventory Valuation Review

Run in the final month of the fiscal year, before the audit cycle begins. One row per warehouse or stock location.

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LOCATION / WAREHOUSE	VALUATION METHOD IN USE	SAME METHOD AS PRIOR YEAR? (Y/N)	SAME-SKU UNIT VALUE CHECK (MATCH AT ALL LOCATIONS?)	LIFO USED? (Y/N — MUST BE NO)	AGING SCHEDULE RUN THIS QUARTER? (Y/N)	PROVISION TOTAL (RP)	ACTION REQUIRED
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1. For the same-SKU unit value check: select one SKU held at two or more locations. Pull the per-unit value from each location's system. If they differ by more than a rounding amount, the locations are using different valuation methods or different purchase-lot reference prices — flag for your accountant before the auditor finds it.

2. Action Required column: CLEAN (all Y/N checks pass, provision recorded), FIX METHOD (inconsistent method found — align before audit), ADD PROVISION (aging schedule not run — run it now and record result), REMOVE LIFO (LIFO found — contact accountant for retrospective restatement plan). No 'Action Required' column should be blank.

PART 3

Specific-Case Worksheets

Pre-framed scenarios — each worksheet walks you through a single, concrete situation. Read the scenario, then fill in your version of it.

Demand Tripling on One SKU — Inventory Response Plan

Scenario: a single SKU — previously a stable mid-volume seller — has tripled in demand over the past four weeks. The cause is a competitor stockout that redirected their customers to you. Your current ROP and EOQ were calculated on old demand figures and no longer reflect reality. You need to recalibrate both, place an emergency order if stock is already below the new ROP, and assess whether the demand increase is temporary or permanent before committing to a larger vendor contract.

Companion to:

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