YOUR
LOGO

**COMPANY NAME**

INVENTORY CYCLE COUNTING PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] to implement your Inventory Cycle Counting program. We help organizations improve inventory accuracy, reduce shrinkage, and streamline warehouse operations through structured, data-driven cycle count initiatives.

This proposal outlines our approach to designing and executing a cycle counting system for [Client Name].

# Project Objectives

The primary goals are:

- Increase inventory accuracy without disrupting operations
- Replace or reduce full physical inventory counts
- Implement systematic cycle count scheduling based on item importance or movement
- Identify and resolve root causes of inventory discrepancies

# Proposed Services

Our inventory cycle counting services include:

- Inventory classification (ABC or velocity-based)
- Cycle count scheduling and process design
- Training for warehouse staff on count procedures
- System integration support with ERP/WMS platforms
- KPI dashboard setup and reconciliation guidance
- Root cause analysis and continuous improvement plan

# Scope of Work

Scope includes:

- Initial assessment and inventory segmentation
- Cycle count process documentation and checklist creation
- Pilot test planning and execution
- Full deployment strategy with reporting templates and governance guidelines

# Timeline

Proposed project timeline:

|  |  |  |
| --- | --- | --- |
| Phase | Description | Estimated Date |
| Assessment & Planning | Classify inventory and define count criteria | [Start Date] |
| Process Design | Create SOPs and count documentation | [Date] |
| Pilot & Training | Test cycle count and train warehouse staff | [Date] |
| Deployment & Reporting | Launch full schedule and performance metrics | [Completion Date] |

# Pricing

Estimated cost breakdown for cycle counting services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Cost |
| Assessment & Segmentation | Classify and group inventory items | [Amount] |
| Process Design | Develop count schedule and procedures | [Amount] |
| Training & Pilot | Staff enablement and initial count | [Amount] |
| Reporting & Monitoring | Dashboard and ongoing KPI tracking | [Amount] |
| Total Estimated Fee |  | [Total] |

# About Us

[Your Company Name] is a supply chain and operations consulting firm with a focus on warehouse optimization, inventory management, and performance reporting.

- Experience: [X] years improving inventory practices across retail, manufacturing, and logistics
- Expertise: Cycle counting, ERP/WMS integration, inventory accuracy KPIs
- Mission: To create operational reliability by aligning people, processes, and systems

# Case Studies / Testimonials

Case Study: [Client Example]

- Project: Cycle counting implementation for a national distributor
- Outcome: Inventory accuracy improved from 88% to 98% within 6 months

Testimonial:
“[Your Company Name] helped us put in place a simple, repeatable process that gave our team confidence in the numbers.” — [Client Contact]

# Terms and Conditions

Payment Terms: [X]% deposit, balance on final deliverables.
Scope: Includes assessment, count process design, system support, and training.
Client Responsibilities: Provide access to item master data, warehouse layout, and system permissions.
Adjustments: Changes in facility count, item volume, or customization needs may affect pricing and delivery timeframes.

# Acceptance

To approve this Inventory Cycle Counting Proposal and begin services, please sign below.

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
Name: [Client Name]
Title: [Title]
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_